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Upcoming Event



Preface

The aim of the **2nd International e-Conference on Studies in Humanities and Social Sciences (2IeCSHSS)** was to bring together scholars, administrators and students from different countries, and to discuss theoretical and practical issues in different areas of Humanities and Social Sciences. The e-Conference was organized as a kind of a *multi-disciplinary forum* which provided the appropriate opportunities for *inter-disciplinary communications*.

The areas of study covered by the e-Conference were the following: Philosophy, Anthropology, Psychology, Science of Education, History, Linguistics, Arts, Sociology, Political Science, Law, and Economics.

The e-Conference was organized exclusively as an online conference, and the English was the only language of the conference.

Two phases of the e-Conference realization was applied.

The first phase was realized as the **e-Pre-Conference Discussion** (from 17 to 20 December 2018), and this phase was followed by the posting at the COAS website different textual forms sent by the e-Conference participants, such as discussions, analyses, critics, comments, suggestions, proposals, etc., regarding exposed abstracts.

The second phase was the **e-Conference Discussion**, and it was realized at the e-Conference day (21 December 2018), from 00 to 24 (GMT+01:00). This discussion was realized in the same way as the e-Pre-Conference discussion, regarding the full texts exposed at the COAS website.

All submitted abstracts/full texts went through two reviewing processes: (1) double-blind (at least two reviewers), and (2) non-blind (two members of the Scientific Committee). Thus, final decision for the presenting and publishing depended of these two kinds of reviews, in order to be accepted for presentation at the conference and to be published in the e-Conference Proceedings.

The key conclusions from the e-Pre- and the e-Conference discussions were summarized and also published as part of the Conference Proceedings, by decision of the Scientific Committee. The Conference Proceedings will be submitted for indexing in different international databases.

Finally, we would like to thanks to all participants of the e-Conference, as well as to all reviewers and editors, for their efforts which enable that the e-Conference was productive experience.

We are looking forward to the **3rd International e-Conference on Studies in Humanities and Social Sciences (3IeCSHSS)** that will be held on 28 June 2019, using the same online model. We hope that it will be an interesting and enjoying at least as the previous e-Conference.

Scientific Committee



Development of the Flute From Pre-history to Modern Days

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Abstract

A flute is a “keyed woodwind instrument consisting of a cylindrical tube which is stopped at one end, and which has a side hole over which air is blown to produce the tone”, as defined by the Merriam-Webster dictionary. Unfortunately, this definition is only true of modern flutes. The first flutes were simple pieces of bone that had been fashioned with drilled holes. These prehistoric flutes have been discovered as artifacts in many places around the world. However, through time keys were added to expand the note range of the instrument, and to improve the intonation of the notes that were played. These improvements were added slowly, but as interest in the instrument grew, so did new ideas about its technical properties. In this paper I discuss how the flute progresses through time from a simple bone to the metal-keyed instruments of today.

Keywords: music, flute, pre-historic, Egypt, Mesoamerica, bone flute, keys, intonation.

Merriam-Webster defines a “flute”, as a “keyed woodwind instrument consisting of a cylindrical tube which is stopped at one end, and which has a side hole over which air is blown to produce the tone”¹. This is true for the modern flute, and many of the transverse flutes that came directly before it. However, a flute did not always fit that exact definition. The addition of keys were added at the very end of the flute’s history, and the transverse style of playing appeared only shortly before that. The transverse style of playing was when the flute moved from being blown vertically like a recorder, to horizontally like how flutes are played today. Before all of these additions, and modifications to the flute, it was a much simpler instrument, with a much simpler construction. Looking back at the etymology of the word “flute”, it came from the 14th century old French word “flaut” or “flaute” possibly meaning “to blow”. Another explanation to the origins of the word come from the Latin word *flatus*, meaning “a blast,” or “breathing”². This would make sense, as the flute was the first known wind instrument, meaning that it was likely the only instrument that would take a “blast of breath”, to play it. The flute has been around for thousands of years. From the ancient bone flutes of forty thousand years ago, to the technical innovations of recent times, this instrument is among the oldest known in the world. The flute progressed through history slowly, with small adjustments to the construction being made gradually, and the addition of a key or two at a time.

¹ Merriam-Webster Dictionary, Definition of Flute (Merriam-Webster Dictionary, <https://www.merriam-webster.com/dictionary/flute>).

² Phillip Bate, *The Flute*, (London: E. Benn; New York: Norton, 1979), 61.

At the dawn of humanity, there was no music. The modern descendent of the subspecies pertaining to the genus *Homo*, *Homo Sapiens*, began to roam the earth about 200,000 years ago. These pre-historic humans began branching out from their origin in East Africa to Europe, and Central Asia, a mere 60,000 years ago. As pre-historic humans developed the need for communication, and a sense of community, the practice of music came into existence. The exact date of the emergence of the concept of music is unknown, however it is speculated to have begun with the use of the voice. Before instruments, the voice played a primary role in communication, and likely music, assuming that pre-historic man had the cognitive ability to control the voice. The voice came around when the hyoid, a horse-shoe shaped bone in the neck of humans, changed its shape through evolution. When the hyoid's "shape changed... our voice box moved down our throat to take up a position that allows us to talk and sing"³. This was crucial as it "allowed our distant ancestors to communicate before the invention of language", something that is important in establishing a sense of community in a growing society⁴. Eventually, as the brain of the modern human progressed in cognitive ability, ancient people began to craft simple instruments from common materials, allowing for other methods of communication. One of the most readily available materials around at the time were animal bones. Since early humans thrived through the technique of hunting and gathering, there would have been leftover bones from great animals such as the mammoth, cave bears, ancient deer, and various birds. Focusing on the bones of birds, a feature of these bones are that they are naturally hollow. Because of this, ancient man, at some point around 42,000 years ago, decided to repurpose a discarded bone into a crude, prehistoric instrument. This instrument is the flute. Now, the flute likely did not start out as being made solely from discarded animal bones. More likely, their origins began with reeds, as the "musical instruments that appeared in Europe 40,000 years ago are so sophisticated that they must have evolved out of earlier artistic traditions"⁵. It is possible that the origin of the flute could be attributed to a much simpler explanation, such as: "An attempt to blow or suck the marrow from a broken bone. [That] gave rise to a sound that some prehistoric man interpreted as the voice of the bone itself"⁶. Alternatively, and even more simply, "perhaps the wind blowing across the broken ends of grove reeds generated sounds that attracted [prehistoric man's] attention"⁷. Regardless of the origins of the instrument, there is proof that 42,000 years ago, by whatever means it was created, the primitive bone flute did in fact exist.

The oldest archaeological specimen of a bone flute comes from the Geissenkloesterle Cave, in Germany (Figure 1). Found next to four carvings of a human, mammoth, cave bear, and bison, it is easy to expect that this instrument was not created anytime within recent history. This bone flute, which was made out of bird bone and ivory, was found in 2012, and through the use of stratigraphy, and Electron Spin Resonance, was found to have been from around 42,000 years ago, making it the oldest surviving instrument in the world⁸. There were definitely flutes before it, likely made of reed, as discussed prior, but they likely did not stand the test of time simply because of the likelihood that organic materials from so long ago would have decomposed. Only organics in the right conditions would have a chance at being preserved, and as the world was very different back then in climate than it is now, those conditions were unlikely to cause organic preservation over 42,000 years. Returning to the Geissenkloesterle flute, it has some unique features that

³ Colin Barras, 3 Colin Barras, Did early humans, or even animals, invent music? (BBC Earth, 7 September 2014, <http://www.bbc.com/earth/story/20140907-does-music-pre-date-modern-man>).

⁴ *Ibid.*

⁵ *Ibid.*

⁶ Phillip Bate, *The Flute* (London: E. Benn; New York: Norton, 1979), 54.

⁷ *Ibid.*

⁸ Susanne Munzel, the Geissenkloesterle Flute-Discovery, Experiments, Reconstruction, (University of Tübingen, Department of Early Prehistory, and Quaternary Ecology, https://www.academia.edu/4030460/The_Geissenkloesterle_Flute_Discovery_Experiments_Reconstruction, 107.

separate it from other bone flutes that have been found. One important feature is the technique used to make the holes in the flute. Usually, when making a hole in a material destined to be a flute, it would be made vertically through the use of drilling, or pushing a tool through the instrument to create the holes. The holes on this flute are different, as they were created not vertically, but rather horizontally⁹. This means that instead of applying downwards pressure with a tool from above to create the holes, the maker horizontally scraped each individual hole. This feature is especially important because instead of the sound originating at the mouth hole, like on modern flutes, the sound originates at each finger hole, as each horizontally scraped hole acts as an aperture. This design makes the instrument act more so like a series of pitched whistles, than many of the other bone flutes found from around this time. Another interesting feature of the flute is the use of a bevelled mouthpiece. This bevelled mouthpiece directed the air steadily through the bone, making the instrument easier to play. This advancement is further proof that flutes did pre-exist this one, as the bevelled mouthpiece is already a refinement of what would have been flutes without bevelled mouthpieces. On top of having a bevelled mouthpiece, and horizontally scraped finger holes, the Geissenkloesterle flute also features carvings on the body of the flute. These notches are thought simply to be ornamental, as this was a common decoration found on other artifacts from this time¹⁰. Friedrich Seeberger, a pre-historian, made a replica of the Geissenkloesterle flute to see how it sounded, and played. According to Seeberger, the “tones were clear, but very quiet”¹¹. He noted, however, that the holes in the flute were seemingly systematically placed in regards to tone¹². This flute was not simply just someone haphazardly scraping holes to see what would happen when the bone was blown through, but rather this was a calculated, or at least well thought out design in the instrument. Again, another reason to speculate earlier flutes, as trial and error regarding the placement of finger holes at other intervals along the instrument would have occurred. A final feature of the flute is that the tones could be changed by blowing pressure, which allowed for variation in sound¹³. This allows for intonation correction, as well as the manipulation of notes. The flute itself, when played, could possibly even produce a whole tone scale like other bevelled flutes, as long as the lips are placed correctly, and the blowing pressure is accurate to the note needing to be played. Unfortunately, because the Geissenkloesterle flute is an incomplete artifact, it is impossible to be able to tell exactly what it would have sounded like, and looked like at the time. It is very possible that it would have had more holes along the rest of its body, and could have been much longer in length, allowing for a larger range of tones.

Another important archaeological discovery in Germany took place at the Hohle Fels cave. Here, prior to the discovery of the Geissenkloesterle flute in 2012, the Hohle Fels flute was the oldest known instrument in the world. Other bone flute fragments that came out of the Hohle Fels cave were dated at 35,000 years ago. However, with the flute discovered in 2008, dating techniques show that this flute is actually thought to have come from closer to 40,000 years ago, unlike the other fragments that were found earlier¹⁴. The flute is made out of Griffon vulture bone, another flute taking advantage of the hollow bones of birds (Figure 2). This flute was found to have five finger holes, and had a length of about one foot. This flute is similar to a penny whistle in appearance, as it is a long, straight, hollow, end-blown tube. In regards to tone abilities, replications have found that the flute is able to play something similar to the modern pentatonic scale¹⁵. The flute also features a unique mouth piece, different from the bevelled flute of the Geissenkloesterle cave. The Hohle Fels flute has a V-shaped mouthpiece, possibly making the flute

⁹ *Ibid.*, 108.

¹⁰ *Ibid.*

¹¹ *Ibid.*, 109.

¹² *Ibid.*

¹³ *Ibid.*

¹⁴ James Owen, Bone Flute is Oldest Instrument, Study Says (National Geographic News, 24 June 2009, <http://news.nationalgeographic.com/news/2009/06/090624-bone-flute-oldest-instrument.html>).

¹⁵ *Ibid.*

easier to play. The sound of this flute was likely very unrefined, and coarse, simply because it is a very archaic instrument. Unfortunately, however, it is nearly impossible to test that theory, as making a completely accurate replica is near impossible for an incomplete artifact in this condition.

Flutes have likewise had a long tradition in the Far East, with probably the biggest influence in China. China, surprisingly enough, actually holds a rich, at least ten thousand year old tradition of flute music in its culture. The oldest flutes found in China come from Jiahu, in the Henan Province¹⁶. This archaeological site contains a treasure trove of ancient bone flutes. Of the bone flutes that have currently been found at this site, they have an average age range between 7,000, and 9,000 years old¹⁷. More importantly than the age of these flutes however, is their condition. Many bone flutes do not survive up to the point of excavation simply because they are made of a fragile material of organic composition. The flutes that were found in Jiahu, however, include artifacts of flutes that are both in poor condition, as well as some in excellent condition. Of the more than thirty flutes that have been found, there are a total of six flutes that are in such good condition, that they are considered the oldest playable instruments in the world¹⁸ (Figure 3). The discovery of intact neolithic flutes is a groundbreaking discovery, as replications are not necessary to test sound and playability. For the six Jiahu flutes, including one dated at 9,000 years old, sound samples, and tests can be performed directly with the existing instrument, making for accurate representations of the playability of other, similar flutes from the time. The 9,000-year old flute is made out of the ulnae bone in the wing of the red-crowned crane¹⁹. The flute is about nine inches long, and has seven holes²⁰. An interesting point to make about the holes on this flute, is that the seventh hole has been altered. When observed closely, it is possible to see that the seventh hole has a second, smaller drill mark next to it, raising it from a G-Sharp, to an A²¹ (Figure 4). This extra drill mark has a lot of significance in the study of ancient instruments. Essentially, this means that the instrument was not only hand-crafted by a person 9,000 years ago, but was also tested, and then had its tuning adjusted to correct it, as well. With this adjustment to tuning, the flute has the ability to play a scale very similar to the Western eight-note scale²². This information is important because it allows archaeologists to study the tonality of the music that could be played on this instrument. Rather than only having the ability to play a pentatonic scale, or some other form of scale like some of the other flutes could, this flute had the ability to play all of those notes, and more. The fact that the instrument could play a well-constructed scale is also important because it shows that unlike what is commonly thought, prehistoric culture, and more specifically prehistoric Chinese culture, was far from crude²³. The scale, it is also important to note, starts above the treble staff, at A", well within the range of a modern flute from today²⁴. In regards to the sound of the instrument, "Garman Harbottle, a nuclear scientist who specializes in radiocarbon dating at Brookhaven National Laboratory on New York's Long Island", reports that

¹⁶ Brookhaven National Laboratory, Brookhaven Lab Expert Helps Date Flute Thought to be Oldest Playable Musical Instrument: Bone flute found in China at 9,000-year-old Neolithic site (Brookhaven National Library, 22 September 1999, <https://www.bnl.gov/bnlweb/pubaf/pr/1999/bnlpro92299.html>).

¹⁷ *Ibid.*

¹⁸ Henry Fountain, After 9,000 Years, Oldest Playable Flute is Heard Again (*New York Times*, 28 September 1999, <http://www.nytimes.com/1999/09/28/science/after-9000-years-oldest-playable-flute-is-heard-again.html>).

¹⁹ Brookhaven National Laboratory, Bone Flute Found in China at 9,000-Year-Old Neolithic Site.

²⁰ *Ibid.*

²¹ *New York Times*, After 9,000 Years, Oldest Playable Flute Heard Again.

²² Brookhaven National Laboratory, Bone Flute Found in China at 9,000-Year-Old Neolithic Site.

²³ CBS News, A 9,000 Year Old Tune, (*CBS News*, 23 September 1999, 5:42 pm, <http://www.cbsnews.com/news/a-9000-year-old-tune/>).

²⁴ *New York Times*, After 9,000 Years, Oldest Playable Flute Heard Again.

it has “a reedy, pleasant sound; a little thin, like a recorder”²⁵. Even though the sound was unrefined, and thin it was pleasant, and reminiscent of a well crafted instrument that would have been come into existence at a later time. Another interesting fact about the flutes found in Jiahu is the reason for the instruments being made out of bone. Like with other bone flutes, there were flutes made out of other materials, such as reed for example. In the neolithic Chinese culture, however, emphasis was placed on making flutes out of bone instead of reed, as to make the instrument more resilient, and resistant to damage²⁶. The Jiahu flutes hold a very special part in the history of the flute in particular, because they are the oldest intact instruments in the world, that are still able to be played today.

By the first century BC, we witness one of the first bone instruments in the Americas. Coming out of Yugue, in pre-Columbian Mesoamerica, this bone flute is dated to around 100-250 CE²⁷ (Figure 5). This flute is much different than the other bone flutes that were previously talked about. The flute was almost a foot long, at 25.3 cm in length, and had four holes on the front, and one hole on the back²⁸. This is already a difference from the other bone flutes, as all of their holes appear on only one side of the instrument, instead of some on the front, and some on the back. The hole on the back is an indication for the use of the thumb in fingerings, which was new to the instrument. Another aesthetically different change between this, and the previous bone flutes is the addition of intricate carvings on the body of the flute (Figure 6). The flute has carvings of two figures, one seeming to represent a skeleton, and the other just a human face wearing a mask. The carving of the skeleton is accompanied by a “volute”, also known as a “speech scroll”. Speech scrolls were “a widely used means of depicting the movement of air in the pre-Columbian art of Mesoamerica, particularly speech, wind, music, song, breath, and scent”²⁹. In this case, the volute is likely representing speech, or music. The skeletal carving is “positioned so that the depiction of its breath or voice is being projected toward the bell of the flute, which is the end from which the musical instrument produced sound”³⁰. Because of this positioning, the sound would have appeared to emanate from the mouth of the carving. The positioning of the head in the carving is also important to note, because it is positioned so that the fourth finger hole lines up with the anatomically correct position of an eye hole. The reason for the addition of a carving of a skeleton in the body of the flute can only be speculated. For example, the skeleton could have been a reference to the significance of death, or even just a reference to the deer bone that the flute was crafted from. The other carving, the one of the masked face, is attached to the volute of the skeletal carving. This figure of a masked human face is particularly unique because of its speculated relationship to important gods in the Oaxaca society. The figure wears a long, beaked mask that features fangs over the mouth and chin. The mask is known as a “Buccal mask in Mesoamerican iconography, [and is] consistently associated with rain and wind divinities in the pre-Columbian era”³¹. Archaeologists have speculated that the etchings on the flute represented the voice of the gods³². The “voice of the instrument makes manifest a second entity who is probably an ancestor impersonating a Mesoamerican rain or wind divinity”³³. This carving also has a volute extending from its mouth. The flutes in the Yugue society likely held an important role in summoning gods from the sky to the human world for use in rituals. This type of musical association was also apparent in the rituals of other ancient mesoamerican societies, such as the Aztecs, who would use

²⁵ *CBS News*, A 9,000 Year Old Tune.

²⁶ *Ibid.*

²⁷ Sarah B. Barber, *Sounds of Death and Life in Mesoamerica: The Bone Flutes of Ancient Oaxaca (Yearbook for Traditional Music, Volume 41, International Council for Traditional Music, 2009)*.

²⁸ *Ibid.*, 99.

²⁹ *Ibid.*, 100.

³⁰ *Ibid.*

³¹ *Ibid.*, 99.

³² *Ibid.*, 100.

³³ *Ibid.*, 101.

trumpets to summon gods during human sacrifices³⁴. The discovery of this flute was also important because for the first time, a flute was found with other funerary objects in a grave. This flute was located in the grave of a young boy who died when he was only between fifteen, and seventeen years old. This boy was likely of higher status because of a lack of physical evidence of physical labour, and because he was buried with a clay pot, and an imported pyrite mirror³⁵. The boy died of unknown causes. However, it is likely that the boy played the flute while he was alive, because it was positioned in the grave as if it was being played. The fingers of the boy were placed curved around the bell of the instrument, with the finger holes facing away from the body, and the instrument resting against his left forearm³⁶. Unfortunately, it is impossible to replicate the sound of this flute, because it was made using the bones of a deer from 2,000 years ago, and a modern deer bone, even with similar measurements, would not have the same internal bore as that of the Yugue flute. It was also found in a very poor state, with fractures separating the bone into upwards of fifty pieces, and was coated in a layer of crystallized salts beneath the bone's outer surface³⁷. Regardless of the condition that the flute was found in, it was likely a very important item in the Yugue society, and would have been crafted, and played, by someone who possessed a very valuable, musical skill.

There are various theories about the importance of the flute in early societies. One theory is that because these flutes are often found in sites with other artistic means of expression, including Venus figurines, and cave paintings, it is possible that the making of instruments was just another way that early humans began showing a sense of self-expression. This is important because these paintings, and carvings came around as the beginnings of human cultures, differentiating the *Homo Sapiens* subspecies from other hominins of the time. Another theory about the importance of the flute in early cultures is that the creation of instruments were important because of their role in the making, and tightening of bonds in communities, and groups. Since listening to, and playing music is a way of bonding with the people around you, it is very possible that it worked in a similar way in older societies. Music would have likely been used in a ceremonial context, for dancing, and perhaps even for entertainment purposes. An old story from China even tells of a hunter using a reed flute to attract birds when hunting. So, ancient flutes could have been made, and used as a tool for luring prey to hunters. However, more likely, ancient flutes were made for many reasons, as the proof for a singular reason of production has yet to be found.

In the ancient society of ancient Egypt, flutes appeared as a common instrument. Unfortunately, very little is known about flutes of this time period. One specimen, however, comes from an archaeological excavation in 1890. An archaeologist, Mr. Flinders Petrie, had been asked by Thomas Lea Southgate, someone who was studying the rise of musical notation, to look for any signs of music notation in the area he was excavating. Petrie, however, came across something else entirely, a pair of ancient Egyptian double-flutes buried in a 3,000 year old tomb with the body of Lady Maket. These double flutes were each "About sixteen inches long and three-sixteenths of an inch diameter," with four finger holes on one, and three on the other³⁸. Many of the ancient flutes recovered from Egypt had either three, or four finger holes, which means that three, or four holes was likely a common feature of the flutes³⁹. The bores of these flutes were incredibly small, with

³⁴ *Ibid.*

³⁵ *Ibid.*, 96.

³⁶ *Ibid.*

³⁷ *Ibid.*, 98.

³⁸ Thomas Lea Southgate, On a Pair of Ancient Egyptian Double-Flutes (*Proceedings of the Musical Association*, 17th Session, Taylor & Francis, Ltd. On behalf of the Royal Musical Association, 1890-1891), 13.

³⁹ *Ibid.*, 18.

Southgate stating that he “felt that such slender tubes as these would not have spoken as flutes⁴⁰.” These flutes likely used some sort of reed mouthpiece, as it was hard to direct large amounts of air into such a tube of such small diameter. Southgate tested the possible sound of the double-flute three ways. The first was by lip blowing, the second was by using a small straw reed, and the third by using a small, tenor bagpipe reed. The first method, the lip-blowing, yielded the notes F#, G, A, Bb on the three holed pipe, and F#, A, Bb, C, and D, on the four holed pipe. The fundamental note for the two tubes is the F#⁴¹. Using a small straw reed, Eb, F, G, Ab, and Eb, G, Ab, Bb, Cb, respectively. Because the reeds obey the law of acoustics, the notes are “Down an octave lower, and about one tone fatter, to agree with the additional length the short piece of straw added to the tube⁴².” The bagpipe reeds were unfortunately found to be too strong, and resulted in the pitch being lowered further by a minor third⁴³. The results of this test found that “By varying the wind pressure, obtains from the three-hole pipe the complete diatonic scale of C,” meaning that with practise, an instrumentalist could have easily manipulated the instrument in this way⁴⁴. The flutes were also not likely both played at the same time, but rather one likely acted simply as a drone, played under the melody of the other. It is possible that the flutes would have been played in a quivering between the two pipes, as a possible beginning of the tremolo⁴⁵. The pipes were also stopped by the second joints of the fingers, rather than the first⁴⁶. The pipes were blown in an inverted V-shape, as depicted in a fresco from another tomb, Beni Hassan⁴⁷ (Figure 7). This fresco depicts “a lady playing the double-flutes, accompanied by some others, clapping their hands to the dancing of two Nubian girls”⁴⁸. The depiction of dancing, and clapping shows the flute in what is likely a casual setting, with the purpose of entertainment in honour of the god Ptah, the god of craftsmen, and architects. The Egyptians called the pipes “Mam”, supposedly with Phoenician origins⁴⁹. They were also present in Greek culture as *Tibia pares*, and *Tibia impares*, depending on whether the tubes were the same length or not. The holes on the pipes were not haphazardly placed, but rather the tuning was regulated. As for their significance, the flutes were likely played by Lady Maket as a form of entertainment, as well as in ceremonies.

The flutes of ancient Greece were less common than that of ancient Egypt. Not very much has been uncovered about flutes from this time. The flute was not overly popular, with the aulos, a double-reed instrument with two pipes, as the flutes main competition. The aulos is often called a 'Flute,' though it does not technically match the definition of a flute, and is much more similar to an oboe. The transverse aulos, however, was closer to a flute, than the regular aulos was. The transverse aulos was a single pipe of the flute type, that was held sideways, like a modern flute⁵⁰. This flute was only in use in a pastoral environment. It was used by shepherds, and herders, as an instrument of the common folk. The flute does not appear in Greek art, or literature until the Hellenistic period⁵¹. Greek instruments tended to remain simple. The flutes were not a large part of ancient Greek life.

⁴⁰ *Ibid.*, 13.

⁴¹ *Ibid.*, 22.

⁴² *Ibid.*, 24.

⁴³ *Ibid.*

⁴⁴ *Ibid.*, 25.

⁴⁵ *Ibid.*, 27.

⁴⁶ *Ibid.*, 26.

⁴⁷ *Ibid.*, 19.

⁴⁸ *Ibid.*, 18.

⁴⁹ *Ibid.*, 20.

⁵⁰ John G. Landels, *Music in Ancient Greece and Rome* (Taylor & Francis e-Library edition, London, 2002), 25.

⁵¹ *Ibid.*

For the ancient Romans, however, the flute played a more central role in their society. The Romans called reed-pipes the “Phoenecian pipes”⁵². For the ancient Romans, the pipes stood for the ideal of the god Dionysus. Dionysus is the god of the irrational, and chaos, making the pipes stand for just that. The pipes were also associated with ecstasy, and inebriation⁵³. A coin from Caesarea, in Syria, is stamped with a picture of a flute, meaning that by the 2nd Century, Rome had for sure been acquainted by the flute⁵⁴. This coin features an image of a transverse flute (Figure 8). Another artifact from around the time of ancient Rome that portrays a flute comes from an Etruscan tomb. When this tomb was excavated, an urn was found. This urn had on it a relief carving of a person playing a transverse flute⁵⁵ (Figure 9). More importantly, this carving showed a flute that was held horizontally, and to the right like a modern flute, with the fingers of the player stopping the holes, and a mouth hole one-quarter of the way along the tube. This urn is likely the first portrayal of a true transverse flute. Unfortunately, there is not too much information on flutes in Roman societies, though their appearance in art show some importance.

There are no flutes from the medieval time period that have survived to today. Unfortunately, the only information that has been gained about medieval flutes comes from art. Though there are no surviving instruments, they do appear often in art. What is especially unfortunate about the lack of flutes from the time, is that there is no possible way to investigate the structure, or sound of the instrument⁵⁶. Unfortunately, no music from the time period has seem to have been written for the flute, either, so the potential range of the instrument is unknown. The flutes, however, judging by the art of the time, were however, held sideways to the left (Figure 10). The flutes had no keys, but likely had six finger holes, and would have been constructed out of a single piece of wood, or bone⁵⁷. The flute likely had use in mostly sacred settings, though use in social settings as well, was probable. Unfortunately, there is no indication on the depictions of flute players as to what kind of music was being played, so their use is only speculated. The majority of medieval iconography depicts the flute in a pastoral setting, often with characters from pagan mythology⁵⁸. This likely means that the flute was more often used in regards to a religious setting, than otherwise. The flute’s importance in regards to the association with pagan mythology is unknown. Other art from the time depicts flutes as used by shepherds, following the theme from earlier times that it was likely a common instrument for herders⁵⁹. Another possible function for the flute in medieval times was the use of the instrument in hunting. Apparently, deer like the sound of the medieval flute, whatever that happened to sound like. Flutes were also used in a military context, contributing to the rise in popularity of the instrument⁶⁰. Unfortunately, the flutes of the medieval era remain in mystery.

During the renaissance interest in the flute intensified. The interest in the flute was sparked by its use in a military setting, particularly by the Swiss army. The Swiss army was of interest because of its use of the fife, another kind of flute in the flute family, and its importance in their military music⁶¹. The renaissance also brings forth the earliest mention of a flute in a treatise, coming from Martin Agricola’s *Musica Instrumentalis Deudsch*, in 1529⁶². This suggested

⁵² Phillip Bate, *The Flute*, 60.

⁵³ *Ibid.*, 61.

⁵⁴ *Ibid.*, 62.

⁵⁵ *Ibid.*

⁵⁶ Anna J. Reisenweaver, *The Development of the Flute as a Solo Instrument from the Medieval to the Baroque Era (Musical Offerings*, Cedarville University, <http://digitalcommons.cedarville.edu/musicalofferings/vol2/iss1/2/>, 2011), 12.

⁵⁷ *Ibid.*

⁵⁸ *Ibid.*

⁵⁹ *Ibid.*

⁶⁰ *Ibid.*

⁶¹ *Ibid.*, 13.

⁶² *Ibid.*

that the flute had two main uses, in the military, and in chamber music. The flutes from the early renaissance had six finger holes which were spaced in two groups of three, with a body crafted out of a singular tube⁶³. This configuration of holes allowed for the player to choose which hand was closest to the mouth hole. Players chose either to place their left, or right hand closer to the mouth hole, though usually the instrument was held to the right⁶⁴. There were three main sizes of flutes; Bass, tenor/altus, and descant. These were similar to the configuration of the four voices in a choir. Flute makers would usually make all three sizes of flutes, and sell them in sets for proper relative tuning between the instruments⁶⁵. Flutes of this time typically had a range of fifteen to sixteen notes, and sounded an octave higher than written, similar to how a piccolo sounds today⁶⁶. The instruments, however, were surprisingly large, suggesting a flat pitch⁶⁷. The original pitch suggestion is that the Bass flute was in G, the tenor/altus was in D, and the descant was in A, however, because of this large size of instrument, it is more likely that the instruments would have been in F, C, and G respectively⁶⁸. The earliest “surviving music for flutes is to be found in Attaignant’s two chanson collections of 1533 which mark off most of the pieces contained in them by the letter A to indicate the use of flutes and B”, for recorders, a more popular wind instrument of the time⁶⁹. Most of the pieces, however, are actually marked by both, and could be played by either instrument. Interestingly enough, the pieces marked for recorder only are the pieces that do not contain a flat in the key signature, possibly meaning that it would have been more practical to have recorders play pieces without flats, as the flute may have issues with playing in flat keys⁷⁰. These pieces would have required all three types of flutes, as “a consort of alto, two tenors and bass are intended”⁷¹. The largest surviving group of renaissance flutes comes from the Academia Filarmonica in Verona⁷². This large collection of flutes allows for the study of the sound, and mechanics of the flutes. One notable point of interest is that most of the flutes were tuned to a pitch of A450, but two of the French flutes in the collection were rather tuned to A410 instead, which was common in France⁷³. This French tuning is almost a whole tone below the tuning in other places such as Italy. The descant flute is most commonly found to be played in a range up to G”, mostly revolving around a range of F'-D”⁷⁴. This is the range that would have been most resonant, with the best tone quality, and projection. It is to be noted that the bottom notes of the flutes would have rarely been played, as they would have been soft, and would not have resonated well. The renaissance flutes would have given “their high notes quite effortlessly without getting too loud or shrill”, an important quality in an instrument that plays in a higher range than most others⁷⁵. The bores of the tenor flutes range from 17.5 to 18 mm, and the basses from 24.5 to 25 mm, fairly large for a flute⁷⁶. The mouth hole of the tenor flutes tended to be somewhere between 8, and 8.8 mm⁷⁷. This mouth hole was especially small, considering the size of the bore. Flautists

⁶³ *Ibid.*

⁶⁴ *Ibid.*

⁶⁵ *Ibid.*

⁶⁶ *Ibid.*

⁶⁷ Bernard Thomas, *The Renaissance Flute (Early Music, Volume 3, No. 1, Oxford University Press, 1972)*, 2.

⁶⁸ *Ibid.*, 4.

⁶⁹ *Ibid.*, 5.

⁷⁰ *Ibid.*

⁷¹ *Ibid.*

⁷² *Ibid.*, 6.

⁷³ *Ibid.*

⁷⁴ *Ibid.*, 8.

⁷⁵ *Ibid.*

⁷⁶ *Ibid.*

⁷⁷ *Ibid.*

from the time would have likely also doubled on the recorder, with the ability to easily switch back and forth between the two instruments.

By the early 1600's, the flute began progressing much quicker than it had in the past. In the past, technological advancements of the instrument would happen over long periods of times, ranging from hundreds to thousands of years. In the 1600's, the flute began to progress much more rapidly, with multiple improvements made every century since the 17th century. Prior to the early 17th century, flutes were manufactured as a cylindrical, one, or two-piece instrument. In the early 1600's, however, we see rise of a three-piece instrument, consisting of a headjoint, body, and footjoint, just like the modern flute⁷⁸ (Figure 5.1). This change in the number of pieces of the body of the flute was important, as it allowed for easier transportation by breaking the instrument down into smaller parts, as well as it added to the ability to adjust the instrument during setup. When setting up a single-piece instrument, there are no options to adjust the alignment of the footjoint, or headjoint, as the instrument remains as is, in a single piece. With a two-piece flute, containing a body, and a headjoint, the position of the headjoint could be determined by the player when setting up. Similar to the two-piece flute, the three-piece flute allowed for even further personal adjustment because the player could now not only adjust the headjoint to their particular preference, but they could adjust the position of the footjoint as well, allowing for an instrument that could be readjusted to each player's specifications. This ability to transport, and adjust the instrument with more ease allowed for the instrument to gain more popularity as an accessible instrument to more people. Another feature of the flute from the early 1600's was a modification of the footjoint. Now, the footjoint contained a singular key to be played by the player's right pinky finger. (Figure 11) When pressed, the added key on the footjoint would allow for a new note to be played, this note is an Eb⁷⁹. Previously, the note Eb was unobtainable on the flute, and would not be possible to play, making the instrument obsolete for any music in keys that were flat. This note was especially important, as it now allowed flautists to play a fully chromatic scale over two, and a half octaves⁸⁰. This ability to play a fully chromatic scale was also an important feature on its own, as music from the time was slowly moving away from the use of modes in composition, to the use of major, and minor tonalities when composing⁸¹. An instrument that has the ability to play in all flat, and sharp keys has a higher chance of becoming a commonplace instrument, one that is commonly written for, and used. The flute of the early 17th Century also featured a set number of finger holes. Previous instruments, such as the neolithic bone flute, would have a wide range of number of holes for their flutes. By the 1600's, the accepted number was a standard six holes, which allowed for ease of finger positioning, and playability, with three fingers on each hand covering the six holes⁸². Another change in the manufacture of the flute was the introduction of a tapered bore down the centre of the instrument. Instead of having a cylindrical hole down the centre, the flute was crafted with a tapered bore. This tapered bore allowed for "closer spacing of the finger holes, and improved intonation", correcting some of the intonation issues of previous flutes⁸³. In regards to the sound, and playability of the 1600's flute, it was most resonant when played in the key of D major, and closely related keys⁸⁴. Though the flute was now able to play an Eb, the instrument was still mostly used in music with sharp tonalities, such as the B major Aria in Clerambault's *Orphee*, which was actually written for this

⁷⁸ Rachel Brown, *The Early Flute* (Cambridge University Press, 2013), 15.

⁷⁹ *Ibid.*

⁸⁰ *Ibid.*

⁸¹ *Ibid.*

⁸² *Ibid.*

⁸³ *Ibid.*

⁸⁴ *Ibid.*

one-keyed flute⁸⁵ (Figure 12). Other pieces written specifically for the one-keyed flute were some E minor works by Bach, and more importantly, E minor works by Hotteterre.

The Hotteterre family is considered a controversial family in regards to the history of the flute. Jean Hotteterre, and his two sons, Martin, and Jean aine, were esteemed flute makers from France⁸⁶. The most influential member of the Hotteterre family was not Jean or his sons, but rather his nephew, Jacques. Jacques, so named “Le Romain”, because he spent a period of time studying music in Rome, was influential because he brought the flutes made by the Hotteterre family from France to England, to show them off⁸⁷. This move from France to England was important because it is possible that Jacques Hotteterre was the one who introduced French woodwinds to England. French instruments began being used in England since around 1675, and lasted through well into the 18th Century⁸⁸. After this introduction of instruments from France to England, an abundance of English brands including Stanesbys, and Bressan, two flute manufacturers of the time, suddenly began to resemble the instruments manufactured by the Hotteterre woodwind makers⁸⁹. This resemblance means that instruments between England, and France were slowly starting to become manufactured in the same style, in a similar way, creating one of the first standardized models of flute.

Starting into the controversial topic of the Hotteterre family, the Hotteterre’s are possibly attributed to the creation of the three-piece flute mentioned previously⁹⁰. It is unknown whether or not the Hotteterre family introduced the idea of the three-piece flute to Europe or not, but it is possible because the three-piece flute appeared during the time when Martin Hotteterre was actively making instruments. Martin made many improvements on the design of other instruments, including the musette, which showed his skill as a maker, and innovator of instruments. Through the interest in the transverse flute by Jacques, and the influence he had on Martin, it is thought to be possible that the innovation of the three-piece flute would have come around because Martin was seeking to improve other woodwinds of the time⁹¹. Now, this is where the speculation about the Hotteterre family’s contribution to the history of the flute comes in. With multiple people from the Hotteterre family being renowned makers of the instrument, there should be multiple pieces of evidence pointing to an improvement made by the family. Looking at Jacques specifically, and more specifically what was documented when he married his wife, as their marriage contract contained an inventory of his belongings since his parents were deceased by the time of his marriage, an important piece of information is that his possessions did contain many instruments, but did not contain any flutes⁹². Why would a flute maker, and possibly someone who had such interest in transverse flutes, and their possibility for technological improvements not have any available flutes? It is unknown, but this bit of information is definitely a cause for speculation about the family. Another interesting point to make when looking at the inventory of Jacques personal library, is that he did not only not have any flutes at the time of his marriage, but his personal library also did not contain any works for flute⁹³. Even more suspicious than not having any flutes in his personal stock of instruments, why would someone who was actively making, and playing flutes, not have any music written for the flute in their personal library? Something about the situation does not add up, as any other flute maker from the time

⁸⁵ *Ibid.*

⁸⁶ Tula Giannini, Jacques Hotteterre, and his Father Martin: A Re-Examination Based on Recently Found Documents (Oxford University Press, *Early Music*, Volume 21, No. 3, 1993), 377.

⁸⁷ *Ibid.*, 379.

⁸⁸ *Ibid.*

⁸⁹ *Ibid.*

⁹⁰ *Ibid.*, 380.

⁹¹ *Ibid.*, 381.

⁹² *Ibid.*, 382.

⁹³ *Ibid.*, 383.

would be writing for the instrument, or at least own some music that was written for the instrument. One of the Hotteterre's potential customers, von Uffenbach, specifically recorded this entry in his diary: "He [Jacques] led me into a tidy room and showed me there many beautiful transverse flutes that he himself makes and from which he wishes to gain a special profit", so Jacques must have been making flutes, though the historical documents that have thus far been found point against it⁹⁴. What is more likely, however, to explain the lack of documentation of Jacques specifically in regards to the lack of supporting evidence in his making of flutes, is the possibility that Jacques did not work on his own in his own shop, but rather he worked with his father in his shop. This would mean that Jacques' instruments would have been part of Martin's inventory. The shop closed after Martin's death in 1720, and all of the remaining flutes would have likely been liquidated, leaving no trace of Jacques' contribution outside of the shop⁹⁵. Alternatively, the Hotteterre family did have one definite contribution to the history of the flute. In 1707, Jacques wrote a book on flute method, and it contained possible alternate fingerings, most notably for the fingering of F#⁹⁶. The idea of alternate fingerings were important because they allowed players ease in passages where using the regular fingering would create complications, or make the passage too technically challenging. Alternate fingerings gave relief to the musician, allowing for a note similar in tone, and quality to be played, while making tough passages a little bit easier. Another definite contribution of the Hotteterre family is that they did, in fact, make many high-end woodwinds, including flutes. The flutes that have currently been recovered with a mark of "Hotteterre", however, have questionable authenticity, and are possibly just replicas, rather than the actual, historical instruments. There have been eight flutes found with this "Hotteterre", mark that have been accredited to the family as makers. These flutes were found in places such as Berlin, St. Petersburg, and Graz⁹⁷. Of these flutes, two are "documented replicas, and two commonly have been assumed to be copies made in the last century", as well as another two of the instruments, the ones in "Berlin and St. Petersburg, are also not original"⁹⁸. The remaining two flutes could be authentic, but that does not leave many examples of the Hotteterre flutes available for study.

Another important contributor to the developing history of the 17th century flute was Johann J. Quantz. Quantz was not only a maker of flutes, but also played the instrument, and composed multiple works. These works included a total of 121 sonatas, and 4 concertos written specifically for his model of flute⁹⁹. Quantz, building on the three-piece, one-keyed flute of the Hotteterre era in flute construction, added a second key on the footjoint¹⁰⁰ (Figure 13). This key did not add another note to the instrument, but rather it was used as another way to play Eb/D#. Both of these keys when pressed independently, played an Eb/D#. The difference, however, is that the tuning was slightly different between the two, allowing for the note to be tuned by the player, while they were playing the instrument. The holes underneath the two keys were of different sizes, one larger to raise the pitch, and one smaller to lower it. By having two holes of varying size, the flute used enharmonic distinctions in which flats were to be played lower than sharps¹⁰¹. This ability to tune to each individual situation was especially important when playing with other instruments. On previous flutes, the Eb/D# was hard to tune when it was part of a third, or a fifth, with another instrument. This addition of a key to precisely tune, and adjust intonation while the

⁹⁴ Ibid., 384.

⁹⁵ Ibid.

⁹⁶ Ibid., 383.

⁹⁷ Ardal Powell, *The Hotteterre Flute: Six Replicas in Search of a Myth* (University of California Press, *Journal of the American Musicological Society*, 1996), 228.

⁹⁸ Ibid.

⁹⁹ Robert Brown, *The Quantz Tercentary* (The Flute Society of South Australia, 1997), 5.

¹⁰⁰ Ibid., 3.

¹⁰¹ Mary Oleskiewica, *The Flutes of Quantz: Their Construction, and Performance Practice* (*The Gaplin Society Journal*, Volume 53, 2000), 204.

player was playing, allowed for closer just-intonation on these harmonics¹⁰². The adjusted intonation suddenly opened up more uses for the flute as an instrument available to be used in chamber groups where tuning between the instruments was especially important, rather than only thriving as a solo instrument.

Unfortunately, however, when Quantz revealed his design to the musicians of the time, he was criticized, and his design was far from well received¹⁰³. His design was never accepted as an appropriate advancement of the flute. This lack of acceptance by the musical community was because his invention was seen as complex, and impractical. Alternatively, he also experimented with other aspects of the design of the flute which were better received by musicians. For instance, Quantz experimented with the shape of the mouth hole on the headjoint of the flute. At this point in time, the flute had a perfectly circular hole to which the musician would blow across. Quantz, however, decided to experiment with other shapes of opening, eventually deciding on an oval as the most appropriate shape for the mouth hole¹⁰⁴. This is the shape most resembling the shape of the mouth hole in use on the modern flutes of today. He also “undercut the tone holes, and embouchure, giving the flutes the effect of a thinner wall, and improving their response”¹⁰⁵. He would also overcut the tone hole to stabilize the pitch of the instrument, and would often include two headjoints with differently cut embouchure holes¹⁰⁶. Quantz’s flutes were not tuned like other flutes of the time. He felt that the other models of flutes from the time had an F that was too sharp, so on his flute, he tuned it lower than normal¹⁰⁷. By tuning the F lower than other flutes of the time, the note blended more with the other notes around it, rather than being predominantly sharp, causing intonation issues when being played. To fix another note issue, this time with the F#, Quantz offered an alternate fingering for “use when the note does not serve as the third of the chord”¹⁰⁸. Another of Quantz’s innovations is his experimentation with many different materials. The flutes of the early 1700’s, and before were made out of wood. Quantz’s flutes, however, were made out of various imported “hardwoods, including boxwood, ebony, kingwood, lignum sanctum, and granadilla”¹⁰⁹. Since Quantz was trying to manufacture quality flutes, he tried to figure out which would produced the best sound. He decided that “boxwood was the most common and durable wood for transverse flutes”¹¹⁰. Ebony, he stated, however, produced “the clearest and most beautiful tone”¹¹¹. Quantz personally preferred the sound of his ebony flutes, over all other materials. The next advancement he made in the construction of the flute was the addition of a screw stopper, and tuning slide on the headjoint in 1752¹¹² (Figure 6.2). The addition of the tuning slide advanced the three-piece transverse, to now a five piece flute, with the ability of instant pitch flexibility¹¹³. Again, these improvements were made with the intention of improving intonation. Though the tuning slide did not end up being passed onto the next generation of flutes, the screw stopper did, and is still used in the modern flutes of today. A special feature of Quantz’s flutes in particular is the size of the internal bore. With an internal bore “varying from 20.2 to 20.6 mm, compared with other transverse flutes, with diameters ranging from 18.6 mm to 19.9 mm”, the large bore of the Quantz flute produced a very dynamic lower register¹¹⁴. He strived for excellence

¹⁰² Robert Brown, *The Quantz Tercentary*, 3.

¹⁰³ *Ibid.*

¹⁰⁴ *Ibid.*, 5.

¹⁰⁵ Mary Oleskiewica, *The Flutes of Quantz: Their Construction, and Performance Practice*, 213.

¹⁰⁶ *Ibid.*

¹⁰⁷ *Ibid.*, 212.

¹⁰⁸ *Ibid.*

¹⁰⁹ Robert Brown, *The Quantz Tercentary*, 5.

¹¹⁰ Mary Oleskiewica, *The Flutes of Quantz: Their Construction, and Performance Practice*, 213

¹¹¹ Robert Brown, *The Quantz Tercentary*, 5.

¹¹² *Ibid.*

¹¹³ Mary Oleskiewicz, *The Flutes of Quantz: Their Construction, and Performance Practice*, 214.

¹¹⁴ Robert Brown, *The Quantz Tercentary*, 5.

in the lower register because he felt that the flute should mimic the contralto voice, which is in a range similar to that of the lower octave of the flute¹¹⁵. By widening the internal bore, he achieved the range of sound that he wanted. The tone of his flute was the achieved, “full, thick, and masculine”¹¹⁶.

As mentioned earlier, Johann J. Quantz was not only a maker of flutes, but also a composer of flute music. His flute music in particular was written specifically for his model of flute. Most of the music is written in the lower range of the flute, reminiscent of the contralto voice that he wished to imitate with his large internal bore. His music was also written specifically for his two-keyed flute, and puts to use many Eb's, and D#'s, accordingly (Figure 14). In 1752, Quantz wrote a method book on playing the flute, named *Versuch Einer Anweisung die Flöte Transveriere zu Spielen*, or *Essay of a Method for Playing the Transverse Flute*¹¹⁷. This treatise was dedicated to King Frederick the Great of Prussia, and was released in both German, and French. This method was the most detailed, and widely respected flute method, and performance techniques, and practices at the time. The book detailed information specifically to flautists, but also contained “detailed information about music in the mid-18th century that is of general interest to all musicians”¹¹⁸. This information covered important musical topics such as dedicating yourself to music, practise techniques, “breathing, good execution, ornamentation, extempore variations on simple intervals, cadenzas, performing in public, and accompanying”¹¹⁹. All of these topics covered in a single, concise book, made Quantz's methods a commonly referred to book in the 1700's, and later. Even today, the *Versuch Einer Anweisung die Flöte Transveriere zu Spielen* is of good use to both professional, and amateur musicians, regardless of what instrument they play.

An important topic to cover when discussing Johann J. Quantz, is his relation to Frederick the Great, of Prussia. It was already mentioned that Quantz's *Versuch Einer Anweisung die Flöte Transveriere zu Spielen* was dedicated to Frederick the great, but it was not discussed why. Frederick the Great was an amateur musician, and flautist himself, and because of this he hired Quantz to make, and tune flutes for him, starting in 1741. Quantz also provided his royal employer with lessons. Frederick the Great would pay Quantz 100 ducats per flute that was made for him, and in return he would import the various kinds of hardwood that Quantz needed to make the flutes for him¹²⁰. Frederick had a large, personal collection of flutes made by Quantz. These flutes were made of various materials, as mentioned earlier. The most common material, and the one which was only allowed to be used for flutes made for the king, was of course, ebony. Since ebony had the nicest tone, Johann J. Quantz was only permitted to manufacture flutes with ebony that were made for the king¹²¹. Frederick the Great's collection also contained multiple glass flutes, and even a flute made from amber. The flutes in Frederick's collection were not marked the same way as Quantz's flutes. Quantz's flutes were marked with roman numerals, and were not signed, which is odd to not have the maker sign the instrument¹²². This lack of a signature, however, could have simply been the wish of the king, to which Quantz had to obey. Quantz worked closely with king Frederick the Great until his death in 1773¹²³. Because he was employed by king Frederick the Great for over thirty years, and because Frederick the Great held such a large collection of instruments made by Quantz, it is easy to accurately track the improvements in manufacturing technology of the flute.

¹¹⁵ *Ibid.*

¹¹⁶ Mary Oleskiewica, *The Flutes of Quantz: Their Construction, and Performance Practice*, 213.

¹¹⁷ Robert Brown, *The Quantz Tercentary*, 5.

¹¹⁸ *Ibid.*

¹¹⁹ *Ibid.*

¹²⁰ *Ibid.*

¹²¹ Mary Oleskiewica, *The Flutes of Quantz: Their Construction, and Performance Practice*, 218.

¹²² *Ibid.*

¹²³ *Ibid.*

By Quantz's death in 1773, the flute was already undergoing a new set of transformations, following closely in the footsteps that he had made while alive. Quantz had a flute with two keys, and by the late 1700's, additional keys were added (Figure 15). The keys that were added to the flute were a closed Bb, F, G#, and C¹²⁴. The general construction of flutes remained the same, with six finger-holes, but the amount of keys suddenly increased from two, to five completely different notes. The addition of these four new keys was to help with the tone, and quality of the notes. Bb, F, G#, and C before were possible problematic notes, but the addition of the four added keys allowed all notes to be produced with equal tone¹²⁵. The addition of these keys was also important for another reason; adding the four keys eliminated forked fingerings for the usual problematic notes. The elimination of forked fingerings was important because they were often awkward, and not practical for tough, or quick passages. The addition of four extra keys made the flute became to play. Initially, flute players used a mix of baroque flute fingerings, and keyed fingerings, making use of the new additional keys.

Unfortunately, however, though the new keys helped with tougher passages, there were some downfalls in the key mechanisms. For example, if a passage in a piece of music had a D, or an Eb, followed by an F, it could not be played. This trouble with an F in relation to a D, or Eb is caused by the placement of the ring finger. The ring finger controlled both the sixth hole, necessary for D, and Eb, as well as the F key, making it nearly impossible to switch between them smoothly¹²⁶. To remedy this trouble, a duplicate F hole was added, though that caused other problems. This duplicate key allowed an F to be played when adjacent to a D, or an Eb, but did not allow an F to be played when it was written next to an Ab, or G#. Unfortunately, these two fingerings meant that the player would have to alternate between the F key, and the duplicate F hole, when playing a piece. Not all flutes had the same amount of keys. Usual combinations include a flute with four keys (Eb, F, G#, Bb.), six keys (Eb, short F, long F, G#, Bb, long C.), six keys, (Eb, short F, G#, Bb, low C, low C#.), and eight keys (Eb, short F, long F, G#, Bb, long C, low C, low C#.)¹²⁷. The most intricate flute was of course the flute with eight keys, but players often preferred simpler key mechanisms, as many composers composed with simple system flutes in mind¹²⁸. Composers were writing for simple flutes which were capable for playing what was needed, rather than than writing for the small amount of eight-keyed flutes that were being manufactured. Flute manufacturers often manufactured both single -key, and multi-keyed flutes at the same time, rather than focusing on one or the other. Most of the manufacturers that made multi-keyed flutes, were in England. Multi-keyed flutes took longer to come to France. French flutes in particular made use of narrower bores, which helped with facilitating the higher register¹²⁹. Increasing the ease of use of the higher register for the flute remained an increasing trend.

In 1830, Theobald Boehm released a prototype for a new flute. This new flute was the first modern orchestral flute. This flute featured a series of keys, and rings, set on a series of axles (Figure 16). These keys, and rings controlled the opening, and closing of the tone holes. As one key was closed by a finger, another key was activated further down on the instrument, via an axle¹³⁰. This was the first time that the flute had a key system where when one key was pressed, it directly affected the movement of another key, somewhere else on the instrument. The keys also allowed for the placement of the finger holes to be representative of where they are needed

¹²⁴ Rachel Brown, *The Early Flute*, 20.

¹²⁵ *Ibid.*

¹²⁶ *Ibid.*

¹²⁷ *Ibid.*, 21.

¹²⁸ *Ibid.*, 24.

¹²⁹ *Ibid.*

¹³⁰ The Editors of Encyclopedia Britannica, Theobald Boehm (*Encyclopedia Britannica*, 1998).

acoustically¹³¹. The tone holes were also made as large as necessary for tuning, regardless of the hand size of the player¹³². Before, the finger holes had to be small enough to be covered by any player's fingers, rather than manufacturing with appropriate sized tone holes to help with intonation. Boehm's flute was widely accepted in France, and England, but with hesitation in Germany, was accepted later. This system of keys, and rings, is the beginnings of the key system that is still in use today by modern flutes.

Reworked, and refined, Boehm's second model of his flute was revealed in 1832. Boehm "became increasingly aware that the tone holes [on his flute] were placed incorrectly"¹³³. He decided to completely rework his previous fingering system (Figure 17). First, he experimented with the placement, and sizes of the flute's tone holes¹³⁴. By progressively cutting the end of a wooden tube of the same diameter as a flute, he figured out the exact lengths that the air had to travel to make the intonation on his flute perfect. Unfortunately, when he put this method into practice, the notes were flat, so he "moved the holes back towards the headjoint"¹³⁵. Later experimentation revealed that his first two octaves were in tune but due to the holes all being of equal size, the third octave was suddenly out of tune¹³⁶. He corrected this by changing the sizes of the holes to correct the intonation. Unfortunately, this meant that "the holes were too large and too many for the fingers to cover", so Boehm came up with a key system to cover them¹³⁷. The keys on the right hand were similar to his previous model, but the key system for the left hand was changed a lot. For instance, he removed the A key, and "brought the other holes lower so the left hand third finger could reach the A hole"¹³⁸. Boehm also added a key to cover the C# hole, moved the Bb key inline with the other keys, and moved the C hole to the inner side of the tube¹³⁹. He also added two trill keys to the flute, improving the trills for B/C, and C#/D. In 1833 Boehm introduced his flute in various cities across Europe, to which he was generally well received. There was, however, some discouragement because flautists would have had to learn all new fingerings for Boehm's flute. Though people appreciated Boehm's flute, many of them were "discouraged by the new system of fingerings, flautists of old standing decided against it, because they could not resolve upon studying an entirely new instrument; and, possibly, they sometimes saw with displeasure that young artists, by adopting it, acquired an accession of means for producing greater effects in their performance"¹⁴⁰. Though there was a bit of backlash from older, less willing flautists in the community, the skills of the younger flautists using Boehm's system drew attention to the advanced capabilities present on Boehm's instrument. Buffet, a flute manufacturer, later improved Boehm's key system by placing all of the flute's rods, and axles on one side of the flute. He also changed the springs from flat leaf, to needle¹⁴¹. This further improved Boehm's already well-advanced flute.

In 1847, Boehm released another, final model of flute. For this model of flute, he focused on the acoustics of the instrument. Boehm's 1847 flute featured "an internal bore of 19 mm in diameter... [with] the headjoint [decreasing] in diameter to 17 mm at the cork"¹⁴². This allowed for notes that resonated better than the ones played on older flutes. Boehm also changed the shape of the embouchure hole. Improving on Quantz's oval hole, Boehm made the hole

¹³¹ *Ibid.*

¹³² *Ibid.*

¹³³ Elva Lind Þorsteinsdóttir, *Theobald Boehm* (2010), 9.

¹³⁴ *Ibid.*

¹³⁵ *Ibid.*

¹³⁶ *Ibid.*

¹³⁷ *Ibid.*

¹³⁸ *Ibid.*, 10.

¹³⁹ *Ibid.*

¹⁴⁰ *Ibid.*, 11.

¹⁴¹ *Ibid.*

¹⁴² *Ibid.*, 13.

rectangular, rounding the corners. He also made the hole larger. This change in embouchure shape, and size allows for the best sound, and the most control over the instrument, which is still used by flutes today. Boehm also reworked his key system for a third time. He adjusted the size of the tone holes, making them larger. Again, these holes were too large to cover by fingers, but this time he replaced “all ring-keys and [Covered] all tone holes with padded hole covers”¹⁴³. Covering the tone holes with padded keys ensured that no air leakage would interfere with the pressing of the keys. Boehm experimented with making flutes out of different materials, searching for one that produced the best sound. Other flute manufacturers, Quantz for example, had in the past also tried out different materials for his flutes. By 1846, “numerous kinds of wood, ivory, crystal-glass, porcelain, papier-mache, and wax”, had all been experimented with¹⁴⁴. In 1847, Boehm produced the first all-metal flute (Figure 18). Flautists did not have to worry about the instrument splitting, the bore size changing, or the instrument being affected by temperature, like they would have with wooden flutes¹⁴⁵. In 1851, Boehm presented his flute at the Universal Exhibition in London. Sir Henry Bishop, an English composer of the time, stated that “Mr. Boehm has acquired not only perfection in the tone and tuning never before attained but also a facility in playing those keys which were hitherto difficult and defective in sonorousness and intonation”¹⁴⁶. His flute was no small invention, but rather it opened up possibilities that were previously impossible for the instrument. He presented his flute again, in 1855 at the Paris Exhibition, this time winning gold¹⁴⁷.

Following Boehm’s 1847 flute, new keys were added, with mechanical improvements on the body of the instrument. The first improvement was in the mechanics of the G# key. The first G# key, which was the one that was part of Boehm’s mechanics, was open. The second development on the G# key was by Vincent Dorus, a prominent Parisian flautist of the 19th century. In his mechanics, lowering the A key covered the G#, producing a G-natural. However, there were also issues with his mechanism. Since the spring strength of the G#, and the A key were different, it made the A hole key difficult to press¹⁴⁸. Not surprisingly, Boehm thought that Dorus’ G# key was inferior, and did not accept it as a valuable contribution to his design of the flute. Boehm, in response to Dorus’ G#, decided to create his own version of a closed G# key. Boehm’s system included two keys that “remained independent with a strong spring which required greater force”, to open¹⁴⁹. However, even Boehm’s system had its own problems. The intonation of the A was poor, and to correct it Boehm moved the position of the A tone hole. He adjusted the tone by moving the tone hole 1.2 millimetres above its previous position. Boehm, however, recommended the open G#, over the closed G#, and only made two flutes that included his closed G# mechanism. The Dorus G# key lasted only a brief time. Later, it was replaced by a duplicate hole on the inner side of the flute tube. This was because the A, and G# keys were operated by the second mechanism, and could not be separated. This lack of separate mechanisms caused a need for a duplicate key to produce a C#¹⁵⁰.

The next key added to the flute was the thumb Bb. This key was added by Giulio Briccialdi, an Italian flute virtuoso, and composer, in 1849, not long after Boehm’s 1847 flute was released. This key is important because it facilitates technique in flat keys. Bb is an awkward fingering when playing in flat keys. Essentially, the player has to think about playing a Bb, every time the note appears. With the Bb thumb key, the player can keep their thumb on the key so that

¹⁴³ *Ibid.*

¹⁴⁴ *Ibid.*, 14.

¹⁴⁵ *Ibid.*

¹⁴⁶ *Ibid.*

¹⁴⁷ *Ibid.*

¹⁴⁸ Carolyn Nussbaum, *The Mechanical Improvements of the Body of the Orchestral Instrument Since 1847* (Presented to the graduate Council of the University of North Texas, 1994), 5.

¹⁴⁹ *Ibid.*, 8.

¹⁵⁰ *Ibid.*

whenever the fingering for a B-natural is played, a Bb is produced instead, eliminating a lot of hassle in tricky passages in flat keys. The only need to play the regular Bb fingering in a piece would be if a B-natural was to be played adjacent to a Bb. After seeing Briccialdi's Bb thumb key, Boehm wished again, to make his own version (Figure 19). In Boehm's Bb mechanism, the Bb key was placed below the B key, "in order to follow the succession of the chromatic scale on the flute"¹⁵¹. Because of Boehm's so-called "intelligent", and "practical", placement of the Bb under the B key, he felt that his thumb Bb mechanism was superior to Briccialdi's. Unfortunately, Boehm's thumb Bb did not gain momentum in the community, and Briccialdi's thumb Bb is the system that is still used on modern flutes.

After the Bb thumb key was added, the next key to appear on the flute is the C# trill key. The C# trill key is an optional key. The key was first used by Louis Lot in 1863, but was then patented by Mme, Cornélie Villedieu Laube, in 1909¹⁵². This key was created specifically to facilitate the C# trill, but also improves three other trills. The other trills that were improved are: B/C#, B#/C#, and F#/G#¹⁵³. Unfortunately, though this key has many benefits, there are also some negative points. It is said that the "added weight of the C-sharp key and the extra tone hole are thought to have a negative effect on overall tone quality"¹⁵⁴. Because of the pressure put on manufacturers to continually improve intonation, and tone quality, the C# trill key's possible negative impact on the flute overall makes it a questionable addition to the flute, even though it does facilitate one of the most awkward trills on the flute.

Note facilitators are an important modern improvement to Boehm's key system. The first note facilitator is the split-E mechanism. This mechanism allows for the A, and G# keys to work independently from each other¹⁵⁵. This key corrected the intonation, and tone quality of E3. E3 was consistently sharp, with a weak texture, and a lack of clarity on flutes that used the closed G# key. Boehm actually started experimentation with a split-E, while he was experimenting with the closed G# key¹⁵⁶. It was not until 1895, however, that the split-E was invented by, Djalma Julliot, a maker of flutes, and Paul Taffanel, a flautist, and conductor, and the founder of the French Flute School¹⁵⁷. The split-E allows the "G-sharp hole [to be covered] so that the A and G-sharp keys move separately"¹⁵⁸. This allows for the remaining use of Boehm's fingering, without dulling the sound. The next note facilitator is the split-F# (Figure 20). The reason for the addition of this key is that F#3 is unstable, and quite sharp, which led manufacturers to try and relieve this problem. People first started trying to fix this issue in 1923, with Charles Gage's "articulated B, F# device", which never gained widespread acceptance. Next, Lambros Callimahos "designed a key that was operated by an additional trill key attached to a new key on the underside of the tube"¹⁵⁹. This mechanism did not last very long either. It was not until Albert Cooper altered the Bb trill key into an F#3 key, that anyone else had any luck with making a mechanism that facilitated the high F#. "Because the F-sharp is high in pitch due to the extra venting over the B hole... the B perforated hole needs to be covered without covering the B hole itself"¹⁶⁰. By turning the Bb trill key into an F#3 key, this allowed for the perforated B hole to be covered without covering the B hole itself. By adding this mechanism, the F# is stabilized in pitch, and intonation, making the note similar to

¹⁵¹ *Ibid.*, 10.

¹⁵² *Ibid.*, 11.

¹⁵³ *Ibid.*, 12.

¹⁵⁴ *Ibid.*

¹⁵⁵ *Ibid.*, 13.

¹⁵⁶ *Ibid.*

¹⁵⁷ *Ibid.*

¹⁵⁸ *Ibid.*

¹⁵⁹ *Ibid.*, 14.

¹⁶⁰ *Ibid.*, 15.

those surrounding it in the third octave of the flute. Unfortunately, however, the fingering for high F# had to change, as it was an unavoidable outcome.

The high C facilitator was invented in the 1930's by George Barrere. Later, it was implemented by Verne Q. Powell, a flute manufacturer¹⁶¹. This key allowed for the low B key on the foot joint to be closed, while the low C, and C# stay open. An issue with playing high C, C4, is that when the "low B footjoint is used, there tends to be a delay in response when playing C4"¹⁶². This key, alternatively called the "Gizmo key", was never patented, and was, and still is, available from most flute manufacturers, as it has become a staple key on modern flutes. Finally, the last major note facilitator that was added was the low C key. A lever was added to the foot joint which controlled the covering, and uncovering of the C4 tone hole. The lever for the low C key was invented by J. Thibouville-Lamy, and Cie¹⁶³. The lever was placed at the beginning of the foot joint, beside the right hand keys. The low C lever was operated by the player's right-hand pinky finger, just as the low C, C#, and B keys are operated on the foot joint of modern flutes. Alternatively, the lever could also "be connected to the low B key in order to operate passages with b, and to act as an alternate high C facilitator"¹⁶⁴. This meant that flutes without a gizmo key could still control the facility of the high C, by having control over the opening, and closing of the keys on the foot joint through the use of the low C lever.

The modern era in flute design brought with it an emphasis on customizable aesthetics. Prior to the early 1900's, closed hole key systems were the most frequently used. Starting in the 1920's, however, flute manufacturers began preaching the benefits of open holed key systems. Manufacturers would advertise the advantage of being able to vent holes to adjust the tuning of flat notes, as well as the addition of the ability to play quarter tones. By venting the keys, meaning to press, or partially press the key, but leave the hole in the key uncovered, or partially uncovered, the sound, and tone would be changed, ultimately raising the pitch. Venting also allows for other techniques that would appear often in avant garde music. For example, an open-holed flute is "required when playing avant-garde music which includes other techniques such as multiphonics and glissandos"¹⁶⁵. Open holed flutes allow for a wide range of extended techniques, thus often making the open style of keys the style of choice for professional, and intermediate musicians, looking for an instrument that can handle multiple styles of playing equally well.

There are other customizable features one could get on a flute, as well. For example, flutes can be manufactured with a variety of metals starting with the cheapest flutes being made out of nickel for durability. Intermediate, and professional flutes are often made out of solid silver, with the option of also purchasing a flute of solid gold, or solid platinum, usually at special request¹⁶⁶. Each metal produces slight different characteristics in the sound, though this is debated. Besides choosing the body material of the flute, you can also choose the plating. Usually nickel flutes are plated in silver, rather than being made out of silver, to keep costs down, and improve the durability. Silver, however, can be plated in gold, or platinum. One could even get a head joint with a gold plated lip plate, leaving the rest of the flute solid silver, purely for aesthetic reasons. Engraving is also an option, if one wishes to buy a head joint with an engraved lip plate, or a flute with engraved keys. Though of course, for most flautists, no added engraving, or plating is needed, but rather this is for strictly aesthetic purposes.

¹⁶¹ *Ibid.*, 16.

¹⁶² *Ibid.*

¹⁶³ *Ibid.*

¹⁶⁴ *Ibid.*, 17.

¹⁶⁵ *Ibid.*, 19.

¹⁶⁶ Muramatsu America, Platinum Clad, Muramatsu America (<http://muramatsu-america.com/instruments/platinum/>).

The flute has travelled far in time, from its ancient history to the advanced orchestral instrument of today. Starting out as a simple bone with scrapped holes at 42,000 years old, to a solid metal instrument fitted with various axis, keys, and springs in the 21st century. The flute has had a long life full of improvements, of great importance throughout the history of music, and society. How will the flute be improved in the future? At this point in time, nobody knows, however, it is likely that as long as the instrument retains its vital role in music in society, the quest for improved tone, and intonation will remain a goal for flute manufacturers for many centuries to come.

Figures



Figure 1: The Geissenkloesterle flute, as displayed by the University of Tübingen (Steinzeit Musik, 11. *Einfachrohrblätter: Steinzeitsaxophon* (Steinzeit Musik, <http://steinzeitmusik.com/11-einfachrohrblaetter-steinzeitsaxophon>))



Figure 2: The Hohle Fels flute being held by a person in gloves. (John Noble Wilford, *Flutes Offer Clues to Stone-Age Music*, (The New York Times, June 24, 2009, <http://www.nytimes.com/2009/06/25/science/25flute.html>))



Figure 3: The six intact Jiahu flutes. (Brookhaven National Laboratory, Brookhaven Lab Expert Helps Date Flute Thought to be Oldest Playable Musical Instrument (Brookhaven National Laboratory News Release, September 22, 1999, <https://www.bnl.gov/bnlweb/pubaf/pr/1999/bnlpro92299.html>))

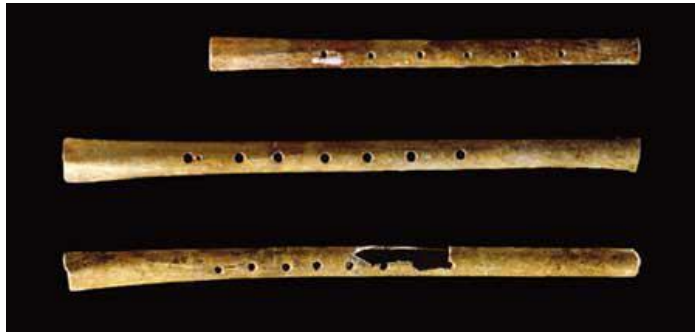


Figure 4: Three of the Jiahu flutes, including the 9,000 year old flute with altered seventh hole.

(Zhang Juzhong and Lee Yun Kuen, *The Magic Flutes: Nine thousand years ago, Neolithic villagers in China played melodies on instrument fashioned from the hollow bones of birds*, (Natural History Featured Story, September 2005, http://www.naturalhistorymag.com/htmlsite/0905/0905_feature.html)

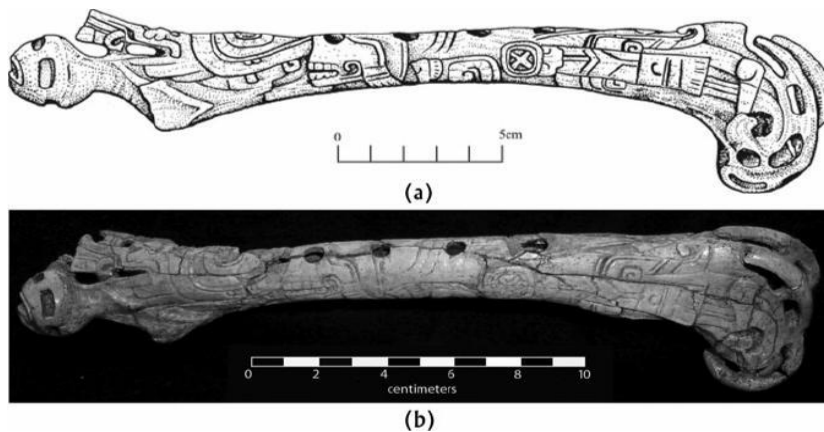


Figure 5: The Yugue flute alongside a drawing for better clarity. (Sarah B. Barber, *A divine wind: The arts of death and music in terminal formative Oaxaca*, (ResearchGate, Figure 6. Yugue flute, lateral view, March, 2012, https://www.researchgate.net/figure/259423570_fig6_Figure-6-Yugue-flute-lateral-view))

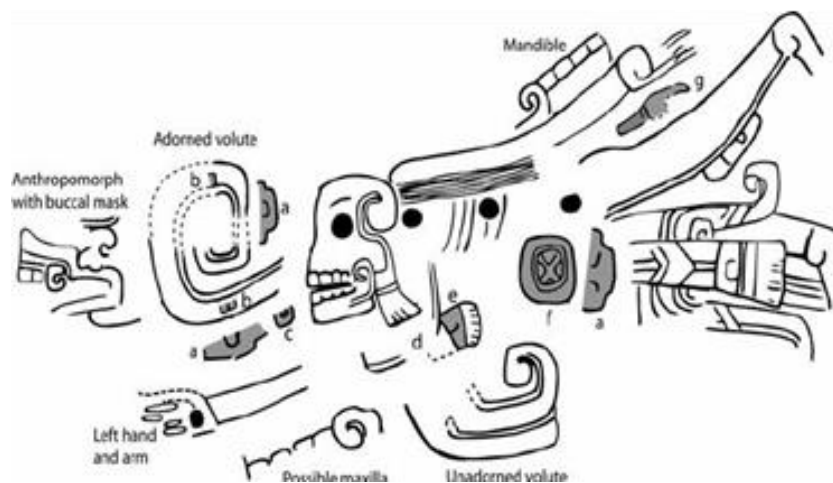


Figure 6: Drawings of the carvings on the Yugue flute (Sarah B. Barber, *A divine wind: The arts of death and music in terminal formative Oaxaca* (ResearchGate, Figure 11. Graphic elements incised on Yugue flute (a) trefoil, (b) paired dots, (c) U-infix motif, (d) pectoral, (e) mirror?, (f) crossed-bands, (g) handled implement, March, 2012, https://www.researchgate.net/figure/259423570_fig11_Figure-11-Graphic-elements-incised-on-Yugue-flute-a-trefoil-b-paired-dots-c))



Figure 7: A depiction of a woman playing the double flutes from a fresco in Beni Hassan (Thomas Lea Southgate, *On a Pair of Ancient Egyptian Double-Flutes* (Taylor & Francis, Ltd. On behalf of the Royal Musical Association, *Proceedings of the Musical Association*, 17th Sess. 1890-1891, pp. 13-33), 18.)



Figure 8: A coin from Caesarea, Syria, depicting a person playing a transverse flute. (Wild Winds, *Ancient Coinage of Syria, Caesarea Panias*, (Wild Winds, Ancient Greek Coins, http://www.wildwinds.com/coins/ric/marcus_aurelius/_caesarea_pantias_SNGANS_862.jpg))



Figure 9: A carving of a transverse flute found on an Etruscan urn. (Walter Maioli, *Flauti, dalla Preistoria all'Elettronica*, (Sound Centre, <http://www.soundcenter.it/wmflauti.htm>))



Figure 10: Medieval art portraying two women playing transverse flutes. (Greg Lindahl, *The Cantigas de Santa Maria: All Color Images*, (http://www.pbm.com/~lindahl/cantigas/images/all_color.html))



Figure 11: A one-keyed flute, popular in the 1600's.
(McGee Flutes, *The McGee-Flutes Research Collection*,
(<http://www.mcgee-flutes.com/collection.html>))



Figure 12: An excerpt from Clerambault's *Orphee* (Louis-Nicolas Clerambault, *Orphee*, (Petrucci Music Library, 1710) [https://imslp.org/wiki/Orph%C3%A9_\(Cl%C3%A9rambault,_Louis-Nicolas\)](https://imslp.org/wiki/Orph%C3%A9_(Cl%C3%A9rambault,_Louis-Nicolas)))



Figure 13: Quantz's two-keyed flute.
(Martin Wenner Floten, *J. J. Quantz*,
(Martin Wenner Floten,
<http://www.wennerfloeten.de/en/products/transverse-flutes/j-j-quantz/>))

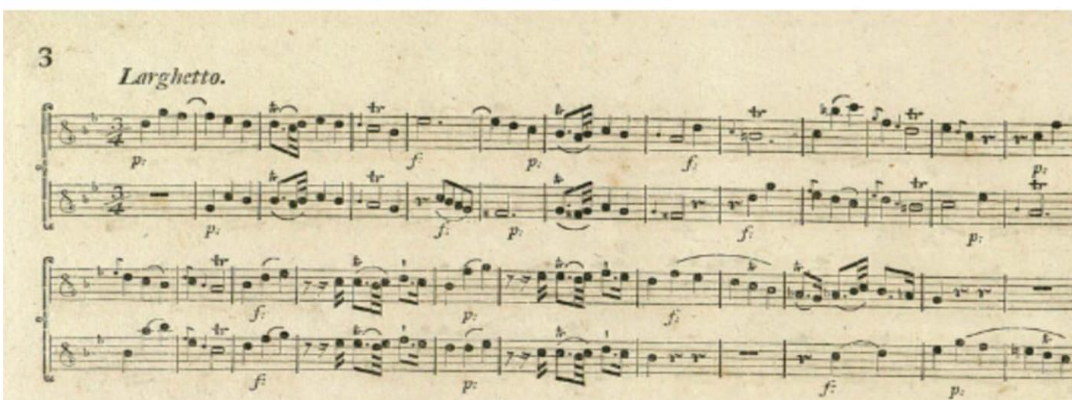


Figure 14: A selection from Quantz's 6 Duets for 2 Flutes, QV 3:2 (Johann Quantz, 6 Duets for 2 Flutes, QV 3:2 (Petrucci Music Library, [http://imslp.org/wiki/6_Duets_for_2_Flutes,_QV_3:2_\(Quantz,_Johann_Joachim\)](http://imslp.org/wiki/6_Duets_for_2_Flutes,_QV_3:2_(Quantz,_Johann_Joachim))))



Figure 15: A flute manufactured in 1800 by Godfroy Aïne (UCT Library, *Concert flute in D with five keys*, (UTC Libraries Digital Collections, <http://www.digitalcollections.lib.uct.ac.za/collection/islandora-20480>))



Figure 16: (A comparison of Theobald Boehm's 1830 model of flute, to a flute from the 1700's. Elva Lind Þorsteinsdóttir, *Theobald Boehm* (2010), 21.)



Figure 17: Boehm's all-metal 1847 flute model (Library of Congress, DCM 0652: Theobald Boehm/Flute in C, (Library of Congress, <https://www.loc.gov/item/dcmflute.0652/>))



Figure 18: Boehm's all-metal 1847 flute model. (Library of Congress, DCM 0652: Theobald Boehm/Flute in C, (Library of Congress, <https://www.loc.gov/item/dcmflute.0652/>))

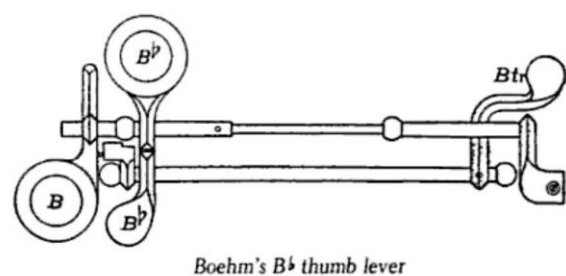


Figure 19: Boehm, and Briccialdi's Bb mechanisms in comparison. (Carolyn Nussbaum, *The Flute: The Mechanical Improvements of the Body of the Orchestral Instrument Since 1847*, (Presented to the Graduate Council of the University of North Texas, August, 1994), 11.)

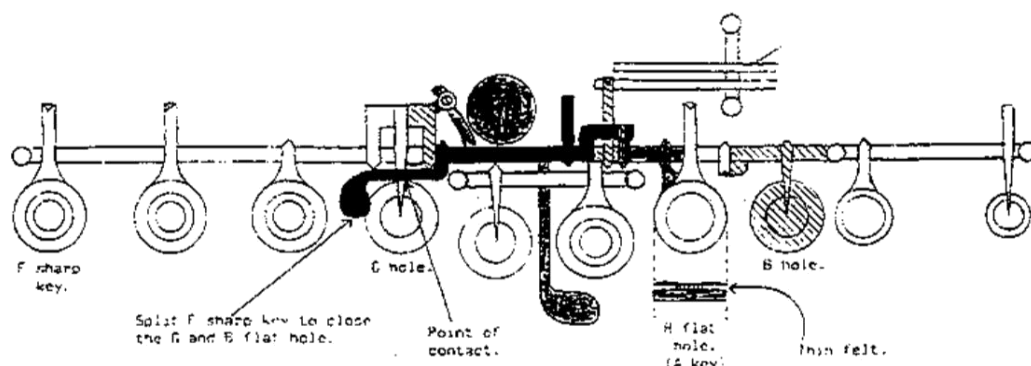
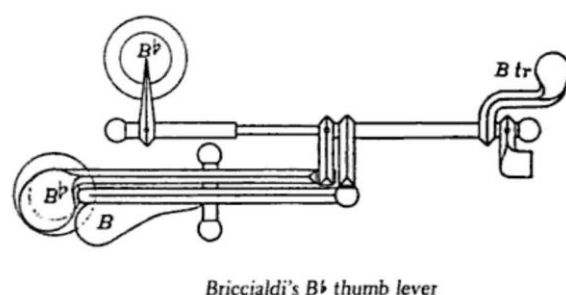


Figure 20: A diagram outline the mechanics of the Split-F# mechanism. Carolyn Nussbaum, *The Flute: The Mechanical Improvements of the Body of the Orchestral Instrument Since 1847*, (Presented to the Graduate Council of the University of North Texas, August, 1994), 15.

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Representation of Mental States of Field-dependent and Field-independent Personalities in Their Subjective Experience

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Abstract

The relevance of the research is caused by a problem of representation of mental states of a personality in the structure of subjective experience. Successful identification of mental states is determined by the clarity of the images of mental states stored in a person's experience. The article is aimed at studying the image of the mental state of field-dependent and field-independent personalities in "past-present-future" time continuum. The data obtained from the study was statistically processed; content analysis and structural and comparative analysis were used, which allowed to detect the dynamics of intensity of mental states image, the degree of structure organization and consistency. The study revealed that mental states of field-dependent subjects are represented in subjective experience with a more complex structure that persists in the foreseeable future. The structure of the state image of field-independent subjects is less organized and is being destroyed in perspective, i.e. there is no clarity in assessing the states in the expected future. The materials of this article can be useful for more successful interaction with different people, for the process of regulation and control of the course of mental states, as well as for predicting mental states in various situations.

Keywords: mental states, field-dependence, field-independence, subjective experience, structure, dynamics.

1. Introduction

Mental state is one of the categories of mental phenomena. Different psychologists made attempts to consider the phenomenon of *mental state* from various aspects, revealing it as affects, emotions, moods displayed in behavior, speech, etc.

Systematic approach toward the study of mental states was suggested by N.D. Levitov. He offers a definition of the mental state which reflects its integrity. N.D. Levitov does not reduce it only to experience, but reveals it using "the principle of the unity of the psyche and activity" (Ganzen & Yurchenko, 1991, 2004)

Mental state is studied as a phenomenon that has many aspects of existence and it is studied within different time scales (Kulikov, 2004). On the one hand, mental state plays its role in integral psychic regulation, and on the other hand, it is subordinated to a specific personal determination (needs, desires, inner latent potential) (Chesnokova, 2004). The ability of

individual to regulate one's condition makes it possible for him to build relationships with other people and to influence activity (Artemyeva, 2007). Mental state is determined by various causes, i.e. acts as a consequence, and it is itself the main determinant, i.e. acts as the cause. The actual mental state acts as a link between mental processes and personality attributes (Prokhorov, 2008)

Mental states have a certain structure, dynamics (Prokhorov, 2011; Artisheva, 2015). This is a personality's holistic reflection of the situation expressed in the unity of behavior and experience in time continuum (Prokhorov, 2011). They develop and unite mental processes and psychological properties, provide the adaptive affect of mental unity. Mental states are broken down into positive and negative ones (Kulikov, 2004), actual (operational, lasting from second to minute), current (lasting from hour to day) and long (lasting for a month, a year or more). It is the long-term states that lead to qualitative changes in personality. Mental states are also broken down according to the level of mental activity: (a) the state of increased mental activity (happiness, ecstasy, horror, panic, etc.); (b) the state of the average (optimal) mental activity (calmness, sympathy, interest, compassion, meditation, etc.); and (c) the state of reduced mental activity (dreams, sadness, fatigue, melancholy, sadness, etc.). High energy level conditions do not last long while the states characterized by a low level of mental activity are more prolonged (Dikaya, 2004).

Being in a certain state, a person can introspectively describe, characterize this state, directing cognitive activity into the inner world and relying on one's own inner experiences (the course of mental processes, physiological changes, behavioral reactions, etc.). The memory of each individual contains information about mental states – that is, mental states are fixed in the memory, being cemented in the structures and forming a subjective experience of experiencing those states.

Mental states are fixed in the subjective experience of a person as an image that has a certain structure and contains information on the intensity and consistency of states (Prokhorov, 2008). That is, an experience is a space-time scheme of states. Experience is the knowledge of the causes of emotions and mental states (Barrett et al., 2007). The image of mental state is an abstract idea of a mental state or a presentation of a state in consciousness. The image of mental state is characterized by three temporal aspects: the actual image of the state which is being formed here and now; the image of the state experienced, i.e. image of memory, idea; the image of the desired state, in which the goals and motives are reflected.

The structure of organization of subjective (mental) experience of a person serves as determinant of individual differences in cognitive and intellectual activity (Kholodnaya, 2004). The rules which organize the existing ideas and incoming information in the structure of experience are defined as cognitive styles. On the one hand, they are attributable to certain general rules of a cognitive sphere organization, and on the other hand, their clarity emphasizes the presence of individual specific mechanisms "inside" subject's experience, which ensure the regulation of his intellectual activity (Kholodnaya, 2004). Mental activity is attributable to subjective experience (goals, emotions, values, etc.) (Kholodnaya, 2004; Artishcheva, 2017).

Cognitive styles participate in the organization of subjective experience structure where the image of mental state is formed. They determine the reflection of external and internal information, the adjustment of cognitive processes, thereby determining the degree of the articulation of experience. The degree of psychological differentiation (articulation) of various forms of experience determines mental development of the personality (Kholodnaya, 2004; Artishcheva, 2017). For people with more articulated experience, cognitive activity is carried out on the basis of individually-unique ways of processing information which have differentiated nature.

The measure of articulation (dissection, clarity, distinctness) of individual experience is the cognitive style of field-dependence and field-independence (Kholodnaya, 2004). This style determines the degree of orientation of a person at the time of making decisions on the experience

and knowledge available to him, and not on the external guidelines, if they contradict his experience. The most important expressions of this style are the inclusion of control mechanisms over affective states. The perception of the field-dependent people is analytically based, while with field-independent people – it is synthetically based (Kholodnaya, 2004). Field-dependent subjects hardly overcome the influence of the external visible field, they need a lot of time to see the “necessary” in the complex, and they perceive the field without trying to reorganize it. Field-independent subjects are more successful in intellectual activity, the “picture” they perceive is more structured. Field-independent subjects are inclined to control the action of the external field with reliance on internal criteria (personal proprioceptive experience). They are able to divide the field into elements, structure and organize the situation, i.e. demonstrate an articulated approach to the field. In difficult situations field-independent subjects activate complex forms of defenses aimed at transforming the experience and building a more connected picture of the event. Studies show that behavior of “synthetics” is more stereotyped than that the behavior of “analysts”, because the first group is characterized by high stability in the evaluation of themselves and others, and they apply a small number of characteristics for it. “Analysts” are more sensitive to changes due to increased differentiation and they allocate more attributes for evaluating others (Artishcheva, 2017).

The field-dependency-field-independency style defines the orientation towards outer or inner space. Field-dependent individuals are subject to the influence of outer opinion, generally accepted rules, the outside world, so – when making a decision – and in this case when describing their conditions – they rely more on the average values of characteristics, without demonstrating their extreme expression.

2. Research methods

2.1 *Research base*

The study involved 93 people of 18-21 years old. Subjects described and assessed the actual mental state experienced at a given time. Then they described and evaluated their mental state, named on the first day of the study, but experienced in the past: a week ago, a month ago, a year ago, and also experience they anticipate in the future: in a week, in a month, in a year.

2.2 *Organization and methods of research*

The study involved self-reports composed in free form (subjective descriptions), the questionnaire “Relief of the mental state” (objective) data. The procedure for examining each day was as follows. The subjects first described their state (actual or experienced at a certain time interval) in free form. Then, using the form of the questionnaire, they assessed the intensity of their state, evaluating its characteristics (physiological and mental processes, experiences and behavior) according to 11-point scale (from -5 to +5). The following days, the subjects described and measured the states they named on the first day of the study, but experienced in other time intervals (a week, a month and a year ago). The same states were described and measured with the prospect for the future (in a week, in a month, in a year). The states described and measured for the subsequent analysis were divided into groups according to D. Lindsley activation continuum and mental activity levels scale of V. A. Hansen (Prokhorov, 2011):

- positive states of a high level of mental activity (love, joy, cheerfulness, spirituality, a joy in life, peppiness, “positive”);
- negative states of a high level of mental activity (fear, hatred, anger, irritability, disturbance, excitement, impatience, jealousy, alarm, tension, anxiety);

- positive states of the average level of mental activity (tranquility, calmness, interest, concentration);
- negative states of the average level of mental activity (uncertainty, indifference, expectation, lack of focus, discomfort, instability, dissatisfaction);
- negative states of low level of mental activity (distress, fatigue, laziness, sadness, apathy, drowsiness, solitude, despondency, oppression, exhaustion, weakness, depression, lethargy, melancholy).

The data from self-reports given in free form were distributed upon 18 factors according to the results of expert assessments: physiological / energy processes; behavior / deeds / reactions / actions / psychomotorics; experiences / expectations / time / hopes; emotions / mood; events / situations; motivation / desires / willingness / needs / opportunities; attitude / assessment / comparison; transcendence / metaphoricity; thinking; perception; speech; attention; memory / views / memory images; consciousness; sensations; imagination; volitional processes; reflection.

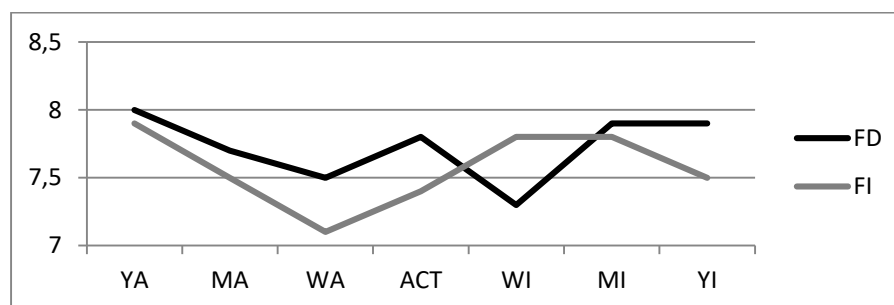
“Gottschaldt figures” technique was used to detect the degree of articulation of the experience – it determines field-dependence of field-independence of the subjects.

The statistical processing of the results included: a comparison of the degree of indicators expression according to the average arithmetic value and to the coefficient of links stability; comparative analysis of the expression of the values of indicators by the criterion of signs, the calculation of the indices of organization (coherence and divergence) of structures.

3. Results

3.1 *The dynamics of images of mental states according to objective estimates*

Figure 1 shows graphs of changes in the objective characteristics of mental states images. Let us consider how the field-dependent and the field-independent subjects evaluate their states at the current time and with reliance on individual experience.



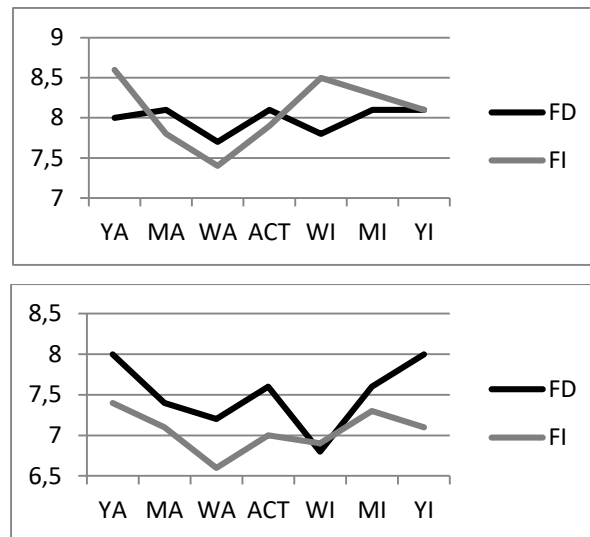
Legend: FD – field-dependent, FI – field-independent.

YA – year ago, MA – month ago, WA – week ago, ACT – actual time, WI – a week in advance, MI – a month in advance, YI – a year in advance.

Figure 1. The dynamics of mental states images in the time continuum (“Objective” data)

Field-dependent subjects, in contrast to the *field-independent* subjects, have a higher intensity of images of states in the past, at the present time and in remote future. The reverse effect can be seen only in a *week in advance* sample. Images of the states of field-dependent and field-independent in a *year* sample in the future and in a *month* sample in the future sections have similar values that are higher than the values of the current state.

The revealed dynamics is provided by the specificity of the assessments received from the subjects which describe their mental processes, somatic expressions, experiences and behavior.



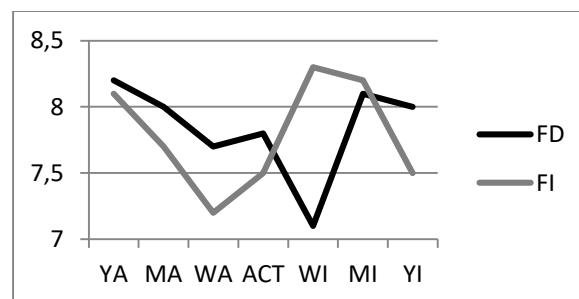
Legend: FD – field-dependent, FI – field-independent.

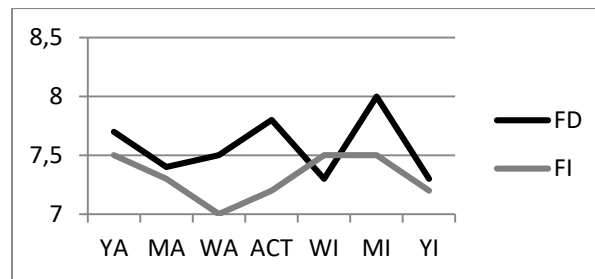
YA – year ago, MA – month ago, WA – week ago, ACT – actual time,
WI – a week in advance, MI – a month in advance, YI – a year in advance.

Figure 2a and Figure 2b. The dynamics of mental processes (2a) and physiological reactions (2b) in the past-present-future continuum

For example, *mental processes* unit (2a) in the image of states of *field-dependent* subjects is characterized by greater intensity in the samples of *a year ago*, *a week in advance*, and *a month in advance*. In the remaining samples this substructure differs by a greater degree of characteristics in the image of the states of *field-dependent* subjects. However, in the *year in advance* sample the values of the substructure of both groups of subjects are as close as possible. The *physiological reaction* substructure (2b) demonstrates a greater intensity in the image of *field-dependent* subjects in the entire time continuum, except for *a week in advance* sample, where the trend reverses.

In the past and the actual time samples, the substructure of the experience (2c) demonstrates the greatest intensity in the images of the states of field-dependent subjects. In the samples of the future, the intensity alternates in field-dependent and field-independent subjects. In the image of the states of field-dependent subjects, the substructure of behavior (2d) is more distinct than in the image of the states of field-independent subjects, and only in a week in advance sample the trend reverses.





Legend: FD – field-dependent, FI – field-independent.

YA – year ago, MA – month ago, WA – week ago, ACT – actual time, WI – a week in advance, MI – a month in advance, YI – a year in advance.

Figure 2c and Figure 2d. The dynamics of experiences and behavior in the past-present-future continuum

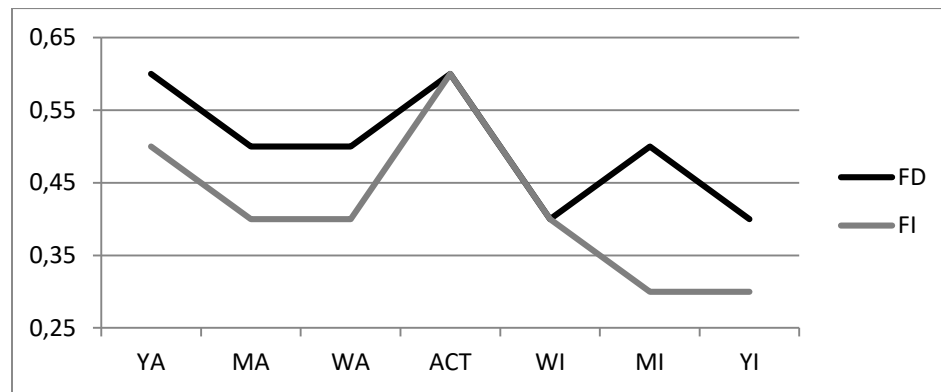
Thus, the states of **field-dependent** subjects are represented in their experience mainly by substructures of *mental processes* and *experiences*. In the remote samples of the past and the future (a year ago, a year in advance) *field-dependent* individuals note a rise in temperature, muscle tone, increased cardiac activity, increased respiration, a feeling of mild hunger (*physiological reactions* unit); consistency, adequacy, openness of behavior are also revealed in the time continuum (*behavior* unit). A pronounced decrease in the values of the characteristics in a *week in advance* sample was revealed. The dynamics of indicators of the states image in the samples of the past is less expressed than in the samples of the future.

The substructure of *mental processes* is the leading one in the image of states of **field-independent** subjects. In samples *one year ago*, *a week in advance*, *a month in advance*, the subjects note cheerfulness, optimism, vivacity, briskness, lightness, relaxed experiences (*experience* unit), and throughout the whole time sample they note the confidence of behavior, which is especially expressed in the samples of the future. The indices characterizing the course of physiological reactions demonstrate an intensity varying within the limits of average values. The dynamics of the indices of all substructures has a zigzag line with a clear drop in a *week ago* sample, i.e. in this interval, the intensity of substructures is reduced. The characteristics of substructures of the image of states of *field-independent* subjects in close time samples of the past (*a week ago*, *a month ago*) reduce the intensity, and when it comes to time samples in the future (in a week, in a month), they increase it. At the same time, in the remote time samples the reverse trend can be observed: in a *year ago* section the intensity rises, and in a *year in advance* section it decreases.

3.2 The dynamics of the images of mental states according to subjective descriptions

Let us consider the specifics of descriptions of the states based on actual time and with reliance on experience.

The image of the states of *field-dependent* subjects has the highest content saturation in *current time* and *a year ago* time samples. In the remaining time samples, the number of described characteristics is reduced. At the same time, the image of the past contains more operants than the image of the future. In addition, the most complete content saturation at the actual time is demonstrated by the image of the states of *field-independent* subjects. And in the samples of the future, the image contains a much smaller number of described characteristics than in the image of the past.



Legend: FD – field-dependent, FI – field-independent.

YA – year ago, MA – month ago, WA – week ago, ACT – actual time,
WI – a week in advance, MI – a month in advance, YI – a year in advance.

Figure 3. The dynamics of the image of mental states in the time continuum (“subjective descriptions”)

In the intervals of *a year ago – in a year in advance*, a group of **field-dependent** subjects – in the descriptions of their states – most commonly use characteristics that reflect the course of physiological and behavioral reactions. In the samples of the past, the image basically often contains motivational components and the description of emotional reactions. In the samples of the future – a description of experiences, expectations. Characteristics that did not occur or were very rare in the descriptions were also identified. In the whole time continuum these are *perception, speech, consciousness*. In some samples of the past the descriptions rarely use the *memory* indicator, while in some sections of the future – *sensations*.

In the group of **field-independent** subjects, the images of the states of the entire time continuum contain mainly indicators reflecting the course of physiological and emotional reactions. The behavioral component is most often used in describing the states of the past and the actual time, and the *experience* component is mostly used in the descriptions of the future states. Some zero indicators were also identified. In the entire time continuum, these include *speech / communication, attention, memory / images*, in the samples of the past – they also include *consciousness, imagination, volitional processes*.

3.3 The analysis of the significance of differences

Let us clarify the significance of the revealed differences using the sign criterion.

Table 1. General picture of the differences in the images of mental states in *past-present-future* time continuum (sign criterion)

p	FD - FI	
	Assessment of "Relief of the mental state" conditions (40 indicators)	Description of states in self-reports (18 indicators)
Year ago	---	---
Month ago	0,05	0,05
Week ago	0,001	---
Actual time	0,001	---
Week in advance	- 0,01	---
Month in advance	---	---
Year in advance	0,01	---

Legend: FD – group of field-dependent subjects, FI – group of field-independent subjects.
p – the difference level.

The difference between the images of the states of the *field-dependent* and the *field-independent* subjects were revealed in all samples, except for *a year ago*, *a month in advance* with values $p \geq 0.05$, $p \geq 0.01$, $p \geq 0.001$. The image of *field-dependent* subjects is more intensive than the image of the *field-independent* ones; only in *a week in advance* sample the reverse trend is observed. It was revealed that there is the same number of differences between the images in the samples of past as in the samples of the future. A comparative analysis of images of states using “objective” data and “subjective descriptions” showed the following results: the image of the states of the *field-dependent* subjects is more intense than the image of the states of *field-independent* ones (no differences in samples *a year ago*, *a month in advance*).

3.4 Structural analysis of mental states images represented in subjective experience

The images of mental states stored in subjective experience of an individual have certain structure which is determined by the connectedness of characteristics and by structural indicators. The analysis of structure of mental states images of field-dependent and field-independent subjects showed the following results.

Table 2. A coherent picture of structural organization of mental states images in the past-present-future continuum

Groups of states	Time sample	Number of indicators in the galaxy Number of galaxies						Stability factor, %	SCI (structure coherence index)	DI (divergence index)	OSI (Organizational structure index)	Structural indicators
		$P \leq 0,05$	$P \leq 0,01$	$P \leq 0,001$	$P \leq 0,05$	$P \leq 0,01$	$P \leq 0,001$					
FD	YA	50	46	34	2	5	3	60	828	66	894	9,24,25
	MA	43	45	33	1	3	5	60,2	637	44	681	9,31
	WA	53	45	35	1	3	6	51,8	601	39	640	8,21,25,26
	ACT	52	41	33	1	2	3	69,7	877	21	898	9
	WI	42	47	44	4	5	8	56,8	512	29	541	10,21,22,40
	MI	51	40	31	2	5	4	52,1	633	23	656	24,26,31
	YI	50	46	38	1	5	5	66,4	883	55	938	7,11
FI	YA	49	43	35	3	2	3	75,6	530	120	650	8,26,27
	MA	51	39	29	2	4	4	59,9	573	39	612	24,25,26,31
	WA	41	40	28	1	2	2	56,3	608	54	662	25,26,29,31
	ACT	54	41	33	1	2	3	55,6	549	106	655	8,28,29
	WI	52	35	32	1	2	7	46,7	347	68	415	21,22,23,28
	MI	50	36	29	1	4	6	48,8	291	69	360	8,21,26
	YI	52	40	33	2	5	6	55	441	23	464	14,22,23

Legend: YA – year ago, MA – month ago, WA – week ago, ACT – actual time, WI – a week in advance, MI – a month in advance, YI – a year in advance.

Groups of subjects: FD – field-dependent, FI – field-independent.

The same indicators form a different number of interrelations which have a different degree of significance – this leads to the formation of both highly organized and low-organized structures, depending on the time sample and style features.

General trend has been discovered – more significant interrelations ($p \leq 0.001$) are formed by a smaller number of indicators (15-44), which are divided into several galaxies. At the same time, one of them includes a large number of elements, while the rest – only 2-3 indicators.

Less significant interrelations ($p \leq 0.05$) form an integral structure with the maximum inclusion of indicators (up to 55 of 58 indicators available).

The images of states of field-dependent and field-independent subjects have a high coherence index (up to 883) and relatively low divergence index (up to 120) of structures. We can state that divergent connections – that is, connections that have an inverse relation – do not violate the overall organization and coherence of structures but only add a little variety.

The structure of the image of mental states of the *field-dependent* subjects is more organized, especially in the *actual time* sample and in a year samples of the *past* and the *future*, and has greater stability of connections throughout the entire time continuum. Whereas the structure of the image of states of field-dependent subjects is less organized with a decrease in the coherence of characteristics from the past to the future. At the same time, links remain stable in all samples, except for *a week* and *a month in advance* samples. That is, the image of mental states of *field-dependent* people is the most complete, integrated, and highly organized.

Structure-forming indices related to the four substructures are revealed in the image of the states of field-independent subjects. However, they basically refer to the units of *mental processes, experiences, and behavior*. Leading components, reflecting the course of physiological reactions, are noted only in the *a year in advance* sample. The leading indicators common for different time intervals were revealed. Thus, cross-cutting structural indicators for *the past* and *the present* samples are *volitional processes*, for *the past* and *the future* – *passivity-activity, sadness-gaiety, lethargic-boyishness of experiences, passivity-activity of behavior*. We should also note the structural indicators that are cross-cutting within a certain time continuum. For the intervals of the past, these are *volitional processes, drowsiness-cheerfulness of experiences*. Inside the continuum of the future no such indicators were revealed.

Structural indicators related to the four substructures – but mostly to the units of *mental processes and experiences* – were revealed in the image of the states of *field-independent* subjects. The leading components that reflect the behavioral characteristics were noted only in the samples of the past, while the physiological reactions – in the sample of *a year in advance*. Cross-cutting structural indicators for the *past-present-future* continuum are: *emotional processes, gravity-ease of experiences*; for samples of past and present this is a *gravity-ease of experiences*; for sections of the future and present: *tension-emancipation of experiences*; for samples of the past and the future: *lethargic-boyishness of experiences*; for the samples of the past – *lethargic-boyishness, drowsiness-boyishness of experiences, passivity-activity of behavior*; for the intervals of the future – *dreariness-gaiety, sadness-optimism, grief-cheerfulness of experiences*.

4. Discussions

The problem of mental states has been discussed for a long time, and there is a number of researches aimed at studying people's emotional sphere (Artisheva, 2017, Prokhorov, 2004, 2011), mental states (Prokhorov, 2011, 2004; Levitov, 2004; Kulikov, 2004) the relations of states and consciousness, the links between states and meanings, personal and individual characteristics, as well as at studying of the age specificity of mental states, and studying functional states, and states in labor and learning activities (Prokhorov, 2011; Artishcheva, 2015, 2017; Prokhorov & Artisheva, 2016), etc.

Speaking of mental states and their representation in consciousness, we concern the issue of a mental state image, which – as it was noted earlier in other studies – is the process and the result of the reflection of states in consciousness. Like any other mental image (image of perception, sensation, situation, human image, associative image, etc.) the image of states is stored in person's memory and it makes up one's subjective experience. On the one hand, the experience includes images of states; on the other hand, the image carries in itself the content of experience.

That is, a person, being in this or that state, experiences certain emotions, feelings connected with certain situations, events, people, etc., which leave a trace in memory and enrich the existing experience or create a new one if the experience is new. Subjective experience of states allows us to identify our experiences, to determine further development, the realization of states on the behavioral and verbal levels, to anticipate the result or the outcome of our experiences.

The subjective experience of mental states has not been studied well enough – it is fragmentarily represented in studies related to the image and mental representations of states. The complexity, clarity and differentiation of subjective experience is determined by the ‘field-dependence- field-independence’ cognitive style. We made an attempt to reveal the representation of mental states in the experience of field-dependent and field-independent people, to reveal how the image of mental states is formed and how it is being represented in the future depending on the degree of articulation of experience. The analysis of the results showed that field-dependent and field-independent individuals have different images of mental states in terms of structure, content and intensity. Mental states of field-dependent personalities who have a slightly differentiated structure of the experience are more intense at the actual time; the links between their characteristics are more stable, they form complex structure. With almost the same features, these mental states are recalled and anticipated, representing from the structures of the experience. In the actual time, field-dependent and field-independent people reveal their states meaningfully; the difference is not in the frequency of occurrence of characteristics used in descriptions, but in their qualitative specifics. That is, in the entire time continuum in describing the states the field-dependent people most often rely on behavioral reactions, external manifestations, while field-independent people – on the contrary – rely on the specificity of emotional manifestations, moods, i.e. on the internal experience.

The research takes a fresh look at the problem of mental state image in the structure of the subjective experience, and in particular, the specificity of the representation of mental states in the experience depending on its articulation (differentiation).

5. Conclusion

1. At the actual time, mental states are evaluated by field-dependent individuals as more intense than those experienced by field-independent subjects. The consistency of mental states descriptions in both groups is high. At the same time, field-dependent individuals most often rely on the description of their external manifestations (behavior, actions, psychomotorics), while field-independent subjects – on the contrary – relate to emotional experiences (emotions, feelings, moods). The structure of the actual mental state image of field-dependent individuals is more complex in terms of organization. At the same time, field-independent subjects have a higher divergence, which indicates the greater flexibility of the structure.

2. Mental states of *field-dependent* subjects are represented in their experience mainly by *mental processes* and *experiences* substructures. The substructure of *mental processes* is the leading one in the image of states of *field-independent* subjects.

3. In subjective experience, mental states of *field-dependent* subjects represent more complex structure with a high bond stability, which persists in the foreseeable future. Whereas the structure of the state image of *field-independent* subjects is less organized with a reduction in the coherence of characteristics from the past to the future, but with remaining stability. The structure of the image of mental state of *field-independent* is destroyed in perspective, i.e. there is no clarity in assessing the states in the expected future.

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Phraseological Units with Head Words Designating Watercraft in Bulgarian and Greek

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Abstract

This paper compares phraseological units denoting watercraft in Bulgarian and Greek, by considering their forms and semantics. This analysis allows linguistic and ethno-psycholinguistic conclusions to be drawn about these two Balkan nations. For phraseologisms with the same head words in both languages, complete and partial similarities are observed. However, a far greater number of phraseological units are found in Greek alone, which can be explained by the fact that, in comparison to Bulgaria, sailing is a common occupation in Greece. A semantic classification reveals that most phraseologisms are significantly personally oriented; in addition, it offers insight into specific features of the world views of Greeks and Bulgarians.

Keywords: phraseology, ethno-psycholinguistics, structural peculiarities, semantics, comparative analysis, Balkan languages.

1. Introduction

Given “the extraordinary cognitive value of the phraseological richness” (Kaldieva-Zaharieva, 2013: 12) of languages, this study goes beyond a purely linguistic analysis to reveal some ethno-psychological features of Bulgarians and Greeks. A phraseological comparison of Bulgarian and Greek is challenging for several reasons. First, there is no clear theoretical framework for phraseology in Greek linguistics. Second, there are multiple phraseological conceptions in Bulgarian linguistic science. Finally, and more generally, the term “phraseology” can be interpreted both in a narrow and broad sense. I adopt Kyuvlieva’s (1986) notion of the “phraseological unit” in the broad sense of the word “phraseologism” (see Kocheva, 2015: 177-179). Given the great diversity of terms used to distinguish the object of phraseology, for the purposes of this study, the terms “phraseologism” and “phraseological unit” are used equally.

The purpose of the research is to compare phraseological units designating watercraft in the two languages, regarding both their forms and semantics. The focus of the analysis is put on nautical phraseological units. This aims to validate the assumption that, in comparison to Bulgarians, sea plays a much greater role in shaping the world views of Greeks, who live in an island and port country.

For the purposes of this research, phraseological units from the following dictionaries were examined: *Greek-Bulgarian dictionary* (2005), *Short Greek-Bulgarian phraseological dictionary* (1994), *New phraseological dictionary of the Bulgarian language* (1993), *Phraseological dictionary of the Bulgarian language* (Vols. 1-2) (1974-1975), *Dictionary*

of modern Greek idioms (2007), *Dictionary of folk and marginal language*, *Dictionary of modern Greek* (2002), *The phraseological dictionary of the Balkans* (1999).

2. A comparison of phraseologisms with regard to form

I characterised phraseologisms with respect to their external forms in order to: (1) ascertain the lexical elements belonging to different parts of speech that constituted their structures and to identify those lexical elements that were more active than others; (2) to identify different types of phraseological units based on their structures (i.e. mono-elemental, bi-elemental, and poly-elemental), as well as the schemes under which they were constructed; and (3) to observe possible form variations. The comparative analysis was conducted by comparing Greek and Bulgarian phraseological units with the following identical or similar head words: *гемия* (ship), *кораб* (ship), *лодка* (boat), and *параход* (steamship) in Bulgarian and *καράβι* (ship), *πλοίο* (ship), *βάρκα* (boat), and *βαπόρι* (steamship) in Greek. In total, eight Bulgarian phraseologisms and 36 Greek phraseologisms were examined.

The representative form of each phraseologism (but not all its variant forms) was analysed in order to provide a generally informative linguistic picture. The research was performed following the approach adopted by Kaldieva-Zaharieva (2005), which refers to a comparison of Bulgarian and Romanian phraseologisms. Form variations of phraseological units were specifically considered in their relation to the variability phenomenon.

An overview of phraseologisms, with reference to their constituent lexical elements belonging to different parts of speech, demonstrated that the most frequent component was the noun followed by the verb, both in Bulgarian and Greek.

Depending on the number of participating autosemantic words, phraseological structures were classified as mono-, bi-, and poly-elemental. A total of two mono-elemental phraseologisms—one in each language—that were fully corresponding phraseological units were observed. These were (*обувки*) *като лодки* ([shoes] like boats) in Bulgarian and *σαν βάρκες (για υποδήματα)* (like boats [about shoes]) in Greek. These two examples represent a comparison with the same construction scheme of comparator + comparatum: (Adv¹ – pr²) + S³, both having their tertium comparationis dropped.

Bi-elemental structures constituted significant portions of the phraseology of both Bulgarian and Greek; the following bi-elemental construction schemes were observed:

In Bulgarian:

A⁴ + S: *тежка гемия* (heavy ship)⁵;

V⁶ + part⁷ + S: *плава ли параход?* (is a ship sailing?).

In Greek:

V + S: *γίνομαι βαπόρι* (I become a steamship);

(Adv – pr) + A + S: *σαν спασμένη βάρκα* (like a broken boat);

¹ Adverb.

² Preposition.

³ Noun.

⁴ Adjective.

⁵ Round brackets are used in this section to insert the literal meanings of phraseological units.

⁶ Verb.

⁷ Particle.

pr + S + V: *σε βάρκα γεννήθηκες*; (were you born on a boat?);

A + S: *αργοκίνητο καράβι* (slow-moving ship);

V + pr + S: *είναι για τα καράβια* (he or she is for the ships);

S + pr + Adv: *το καράβι στα πρίμα* (the ship with a tailwind).

The scheme A + S was found in both languages, for example *тежка гемия* (heavy ship) in Bulgarian and *αργοκίνητο καράβι* (slow-moving ship) in Greek.

Formations of two or more autosemantic words were most numerous, and a great variety of schemes were observed, including the following:

In Bulgarian:

part + part + V + Pron⁸ + P⁹ + S: *да не са ти потънали гемите* (did your ships sink?);

Adv + V + Adv + S + Pron + pr + Adv + part + V: *плитко е там, гемията му на плитко не върви* (it is shallow there, his ship does not move in the shallows);

V + (Adv – pr) + S + pr + S: *засядам/заседна като кораб в плитчина* (I got stuck like a ship in the shallow waters);

Adv + S + V + S + Pron + V + N¹⁰: *когато коработ потъва, плъховете го напускат първи* (when the ship is sinking, the first to run are the rats);

Adv + S + V + part: *тука лодка минава ли* (does a boat pass through here?).

In Greek:

Pron + V + S: *τον κάνω βαπόρι* (I make him a steamship), *την έκατσα τη βάρκα* (I got the boat stuck), *με πειράζει το καράβι* (the ship bothers me), *με πιάνει το πλοίο* (the ship catches me);

V + S + pr + S: *βάλει τη βάρκα στο λιμάνι* (he or she puts the boat on the harbour), *είναι βάρκα χωρίς κουπιά* (he or she is a boat without paddles), *τρώω καράβια με τις γούμενες* (I eat ships together with the ropes);

V + Adv + S: *έπεσε έξω το καράβι* (the ship fell outside), *ρίχνω έξω το καράβι* (I make the ship fall outside);

S + Pron + S: *η μάνα του карабиού* (the mother of the ship), *πλοίο τής ερήμου* (ship of desert);

Adv + S + S: *Πίσω Γιάννη τα καράβια* (backward, Gianni, the ships), *όπως τα ποντίκια το πλοίο* (like the rats the ship);

part + V + part + V + S: *για δε(ς) αν κουνιούνται οι βάρκες* (well, look whether the boats are swinging);

V + c¹¹ + V + pr + N + S: *δεν μπορείς να πατάς σε δυο βάρκες* (you cannot step foot in two boats);

Adv + S + V + S + Pron + Adv + V: *εδώ καράβια χάνονται, βαρκούλες μου που πάτε*; (here ships are getting lost, my little boats, where are you going?);

⁸ Pronoun.

⁹ Participle.

¹⁰ Numeral.

¹¹ Conjunction.

Adv + S + V + c + Adv + S + V: *εδώ καράβια χάνονται κι αλλού βαρκούλες αρμενίζουν* (here ships are getting lost and elsewhere little boats are floating);

V + S + S: *είναι βάρκα γιαλό* (he or she is a boat ashore);

S + V + S: *η βάρκα κάνει νερά* (the boat makes water);

Adv + S + Adv + S: *ίσα βάρκα ίσα νερά* (equally boat equally water);

V + pr + A + pr + S + S: *πάμε στο άγνωστο με βάρκα την ελπίδα* (we go into the unknown with the boat the hope);

V + pr + S + V + S + Pron: *πάτησα στη γη, χέζω τη βάρκα σου* (I stepped on the ground, I defecate on your boat);

V + (Adv – pr) + A + S: *πηγαίνει σαν σπασμένη βάρκα* (goes like a broken boat);

Pron + V + Adv + S + Adv + S: *τα φέρνω ίσα βάρκα ίσα νερά* (I bring equally boat equally water);

V + c + S + V: *χέστηκα κι η βάρκα έγειρε* (I defecated, and the boat leaned);

V + A + S: *γίνομαι αργοκίνητο καράβι* (I become slow-moving ship);

V + Adv + S + Pron: *έπεσαν έξω τα καράβια σου*; (did your ships fall outside?);

V + Adv + Pron + V + S: *κάθεται σάμπως του πνίγηκαν τα καράβια* (sits as if his ships have drowned);

part + Pron + V + pr + S: *θα σε δω στο πλοίο* (I will see you on the ship).

In Bulgarian, no scheme was observed in more than one phraseologism. In Greek, the following schemes stood out as being more productive than others: Pron + V + S, with four formations; V + S + pr + S, with three formations; and V + Adv + S, S + Pron + S, and Adv + S + S, with two formations.

It was not unexpected that many different construction schemes were found among poly-elemental structures; a longer chain offers more opportunities for diversity in the position of elements and the connections between them, as well as in the inclusion of different units (Kaldieva-Zaharieva, 2005: 336-337).

The following phraseological units were constructed using similar schemes: *засядам/заседна като кораб в плитчина* (I got stuck like a ship in the shallow waters) (V + [Adv – pr] + S + pr + S) in Bulgarian and *πηγαίνει σαν σπασμένη βάρκα* (goes like a broken boat) (V + [Adv – pr] + A + S) in Greek; *когато коработ потъва, плъховете го напускат първи* (when the ship is sinking, the first to run are the rats) (Adv + S + V + S + Pron + V + N) in Bulgarian and *εδώ καράβια χάνονται, βαρκούλες μου που πάτε* (here ships are getting lost, my little boats, where are you going) (Adv + S + V + S + Pron + Adv + V) in Greek.

Interestingly, pairs of phraseologisms with similar forms, such as *да не са ти потънали гемии* (did your ships sink?) in Bulgarian and *έπεσαν έξω τα καράβια σου* (did your ships fall outside?) in Greek, and *когато коработ потъва, плъховете го напускат първи* (when the ship is sinking, the first to run are the rats) in Bulgarian and *όπως τα ποντίκια το πλοίο* (like the rats the ship) in Greek, were constructed based on entirely different schemes, for example part + part + V + Pron + P + S and V + Adv + S + Pron, Adv + S + V + S + Pron + V + N and Adv + S + S.

The above characterisation of phraseological units with respect to their forms drew attention to the variability phenomenon. In this respect, the introduction of the Phraseological dictionary of the Bulgarian language (1974) states that “the structural transformations in the

material composition of a phraseological unit are completely neutral in terms of its overall meaning and its grammatical functions” (p. 26). This means that structural transformations must be distinguished from quantitative variations as the latter qualitatively change phraseologisms’ semantic-grammatical characteristics.

Depending on the nature of the variation in the components of phraseological units, three types of variability are distinguished: grammatical, positional, and lexical (see Kaldieva-Zaharieva, 2014: 178-180). With regard to the Bulgarian phraseological material, there was only one phraseologism that showed variation; however, this was presented with some 19 variants, all of which were a manifestation of positional and lexical variability, as follows:

да не <би да> са ти потънали гемите <в морето> (have your ships sunk <in the sea>?); *гемите ли са ти потънали <в морето>* (your ships have sunk <in the sea>?); *гемите ли са ти изгорели <в морето>* (your ships have burnt <in the sea>?); *гемите ли са ти изгорели в Черно море* (your ships have burnt in the Black Sea?); *гемите ли са ти потънали в Черно море* (your ships have sunk in the Black Sea); *гемите ли са ти пропаднали <в морето>* (your ships have fallen <in the sea>?); *гемите ли са ти пропаднали в Черно море* (your ships have fallen in the Black Sea?); *да не <би да> са ти изгорели гемите <в морето>* (have your ships burnt <in the sea>?); *гемите ли са ти изгорели <в морето>* (your ships have burnt <in the sea>?); *да не <би да> са ти изгорели гемите в Черно море* (have your ships burnt in the Black Sea?); *гемите ли са ти изгорели в Черно море* (your ships have burnt in the Black Sea?); *да не <би да> са ти потънали гемите в Черно море* (have your ships sunk in the Black Sea?); *гемите ли са ти потънали в Черно море* (your ships have sunk in the Black Sea?); *да не <би да> са ти пропаднали гемите <в морето>* (have your ships fallen <in the sea>?); *гемите ли са ти пропаднали <в морето>* (your ships have fallen <in the sea>?); *да не <би да> са ти пропаднали гемите в Черно море* (have your ships fallen in the Black Sea?); *гемите ли са ти пропаднали в Черно море* (your ships have fallen in the Black Sea?); *<като че са> ми потънали триста гемии (<as if> three hundred ships of mine have sunk)*; *сякаш (като че <ли>) са ти изгорели гемите <в морето>* (as if [as though] your ships have burnt <in the sea>); *сякаш (като че <ли>) са ти изгорели гемите в Черно море* (as though [as if] your ships have burnt in the Black Sea); *сякаш (като че <ли>) са ти изгорели гемите в Черно море* (as though [as if] your ships have burnt in the Black Sea); *сякаш (като че <ли>) са ти потънали гемите <в морето>* (as though [as if] your ships have sunk <in the sea>); *сякаш (като че <ли>) са ти потънали гемите в Черно море* (as though [as if] your ships have sunk in the Black Sea); *сякаш (като че <ли>) са ти пропаднали гемите <в морето>* (as though [as if] your ships have fallen <in the sea>?); *сякаш (като че <ли>) са ти пропаднали гемите в Черно море* (as though [as if] your ships have fallen in the Black Sea); *сякаш (като че) са ти батисали гемите* (as though [as if] your ships have gone down).

Interestingly, the pan-Balkan character of the above phraseologism was noted: *έπεσαν έξω τα καράβια σου* in Greek, *[pri] sikur i janë mbytur gjemitë* in Albanian, *a i se îneca [cuiva] corăbiile* in Romanian, and *(smrknuti se) kao da su se galije potopile* in Serbo-Croatian (Thomai, 1999: 118).

The variability phenomenon was observed in 12 out of 36 Greek phraseological units, as follows:

1. *για δε(ς) αν κουνιούνται οι βάρκες* (see if the boats are rocking). Variants: *για πά(νε) να δεις αν κουνιούνται οι βάρκες* (go and see if the boats are rocking); *δεν πα(ς) να δεις αν κουνιούνται οι βάρκες* (do not you go to see if the boats are rocking); *πά(νε) να δεις αν κουνιούνται οι βάρκες* (go see if the boats are rocking);
2. *εδώ καράβια χάνονται, βαρκούλες μου που πάτε* (here ships are getting lost, my little boats, where are you going). Variants: *εδώ καράβια χάνονται, βαρκούλες τι ζητάτε* (here ships are getting lost, my little boats, what are you looking for?); *εδώ*

- καράβια χάνονται* (here ships are getting lost); *εδώ καράβια χάνονται, παλιόβαρκες πού πάτε;* (here ships are getting lost, old boats, where are you going?);
3. *εδώ καράβια χάνονται κι αλλού βαρκούλες αρμενίζουν* (here ships are getting lost and elsewhere little boats are floating). Variants: *εδώ καράβια χάνονται* (here ships are getting lost); *εδώ ο κόσμος χάνεται κι αλλού βαρκούλες αρμενίζουν* (here the world is getting lost, and elsewhere little boats are floating); *εδώ ο κόσμος καίγεται κι αλλού βαρκούλες αρμενίζουν* (here the world is burning, and elsewhere little boats are floating); *εδώ καράβια χάνονται, βαρκουλες αρμενίζουν* (here ships are getting lost, little boats are floating);
4. *ίσα βάρκα ίσα νερά* (equally boat equally water). Variant: *ίσα βάρκα ίσα πανιά* (equally boat equally sails);
5. *σε βάρκα γεννήθηκες;* (were you born in a boat?). Variant: *σε βάρκα σε γέννησε η μάνα σου;* (did your mother give you birth in a boat?);
6. *χέστηκα κι η βάρκα έγειρε* (I defecated, and the boat leaned). Variant: *χεστήκαμε κι η βάρκα γέρνει* (we defecated, and the boat is leaning);
7. *έπεσαν έξω τα καράβια σου;* (did your ships fall outside?). Variants: *έπεσαν τα καράβια σου έξω;* (did fall outside your ships?); *βούλιαξαν τα καράβια σου;* (did your ships sink?); *τα καράβια σου βούλιαξαν;* (your ships sank?);
8. *έπεσε έξω το καράβι* (the ship fell outside). Variant: *έπεσε το καράβι έξω* (the ship fell outside);
9. *(κάθεται) σάμπως του πνίγηκαν τα καράβια* (sits as if his ships have drowned). Variant: *κάθεται σάμπως του έχουν πνιγεί τα βαπόρια* (sits as if his steamships have drowned);
10. *με πειράζει το καράβι* (the ship bothers me). Variant: *με πειράζει το πλοίο* (the ship bothers me);
11. *με πιάνει το πλοίο* (the ship catches me). Variants: *με πιάνει το βαπόρι* (the steamship catches me); *με πιάνει το καράβι* (the ship catches me);
12. *ρίχνω έξω το καράβι* (I make the ship fall outside). Variant: *ρίχνω το καράβι έξω* (I make the ship fall outside).

3. A comparison of phraseologisms with regard to semantic content

Following the comparison based on form in Section 2, this section aims 1) to establish a categorisation of phraseologisms based on semantic groups and 2) to draw conclusions concerning certain characteristics of the world views of Bulgarians and Greeks.

A phraseological unit has a single meaning that is not derived directly from the individual meanings of its constituent elements. In the introduction of the Phraseological dictionary of the Bulgarian language (1974), it is stated that a phraseological unit's meaning is “a result of further evolution, the basis of which must be sought in the entire semantic transformation, due to the merging of phraseological components that is obtained in a specific way [the merging]” (p. 31). Furthermore, with regard to the semantics of phraseological units, Kaldieva-Zaharieva (2013) states that “it is not only a specific unifier, it is through it that the phraseologism is born and realised as a separate type of linguistic unit” (p. 185). She adds that it is ‘this dominating inner power, that dictates how far different form variations can extend and how they can be presented’ (Kaldieva-Zaharieva, 2013: 185).

Two main semantic groups were identified:

(1) Phraseologisms with positive or neutral meaning:

тежка гемия ‘important person’¹²;

η μάνα του карабиού ‘the bosun’;

¹² Single quotation marks are used in this section to insert the figurative meanings of phraseological units.

ίσα βάρκα ίσα νερά ‘balancing revenue and expenditure’;

πάμε στο άγνωστο με βάρκα την ελπίδα ‘expresses optimism in respect to an initiative whose result is uncertain, but still with an expectation of a favourable outcome’;

πλοίο τής ερήμου ‘a camel’;

τα φέρνω ίσα βάρκα ίσα νερά ‘to balance revenue and expenditure’;

το καράβι στα πρίμα ‘all right’.

(2) Phraseologisms with negative semantics:

да не <би да> са ти потънали гемите <в морето> ‘used when someone is sulky or thoughtful without having a valid reason for it’; *έπесαν έξω τα καράβια σου*; ‘used ironically towards someone who is worried and we do not know what the reason is for it, or towards someone who is worried without having reasonable grounds for it, or used for a person who is in bad mood without an apparent reason for it’; *(κάθεται) σάμπως του πνίγηκαν τα καράβια* ‘he is worried and silent without an important reason for being in such a mood’;

като лодки ‘too big, not my size (shoes)’; *σαν βάρκες* ‘(used to describe shoes) much bigger and wider than they should be or which have been torn or have widened due to overuse, or huge (feet)’;

когато корабът потъва, плъховете го напускат първи ‘used to point out that, at a crucial moment or moment of danger, those who are calculating and selfish are the first to flee a dangerous place or to break up with the dangerous or losing parties’; *όπως τα понτίκια το πλοίο* ‘used in refer to a person who is leaving a place promptly because they foresee some catastrophic danger’;

тежка гемия (heavy ship) ‘a person who does everything slowly, who finds it hard to make decisions, and who puts things off, or a tardy, slow person’; *αργοκίνητο καράβι* (slow-moving ship) ‘someone who advances in slow steps and is clumsy or tardy (used to describe a person) or something that moves slowly (used to describe wheeled vehicles)’;

засядам/заседна като кораб в плитчина ‘I stay somewhere for a longer time, usually without being able to leave’;

плава ли параход? (is a ship sailing?); *тука лодка минава ли?* ‘used as a reply to someone to expresses distrust, usually accompanied by the following gesture: the right index finger is placed in the right corner of the right eye and the entire right eyelid is pulled down’;

плитко е там, гемията му на плитко не върви ‘used about a person who avoids a place where he or she owes something’;

βάζει τη βάρκα στο λιμάνι ‘used to describe a person (usually a homosexual man) who is promiscuous, who is shameless and, more generally, who is unworthy, mediocre, and execrable’;

για δε(ς) αν кουνιούνται οι βάρκες ‘an ironic invitation to someone who has the impression he or she can deceive us or is trying to deceive us, or someone who acts like they know a lot or are very experienced at something when, in actual fact, we know more and we are more experienced than they are’;

γίνομαι αργοκίνητο καράβι ‘I am moving very slowly’;

γίνομαι βαπόρι ‘I get very angry, and I lose my temper, or I got drunk, and I am not myself due to heavy drinking’;

δεν μπορείς να πατάς σε δυο βάρκες ‘one cannot do two different things at the same time’;

εδώ καράβια χάνονται, βαρκούλες μου που πάτε; ‘used ironically towards people who, although lacking the necessary competence or qualities, get to difficult or important tasks in which even those who are capable fail’;

εδώ καράβια χάνονται κι αλλού βαρκούλες αρμενίζουν ‘used with irony or reproach when someone is doing irrelevant or stupid things when there are serious problems that require an immediate solution’;

είναι βάρκα γιαλό ‘an expression denoting that a place or certain space is flooded, especially as a result of heavy rain, or an expression denoting great instability of a car’;

είναι βάρκα χωρίς κουπιά ‘does not have his or her own opinion or behaves and acts inconsistently’;

είναι για τα καράβια ‘does not have experience in a given sphere of activity’;

έπεσε έξω το καράβι ‘(about a job or commercial enterprise) failed or bankrupt’;

η βάρκα κάνει νερά ‘the job or event does not go well or a problem occurs’;

θα σε δω στο πλοίο ‘an ironic expression said to a person in whom we are not interested that if we met them again, it will not be because we have aimed to do so’;

με πειράζει το καράβι ‘I suffer from seasickness caused by maritime transport (ship or boat) or by rough seas’;

με πιάνει το πλοίο ‘I suffer from seasickness caused by maritime transport (ship or boat) or by rough seas’;

πάτησα στη γη, χέζω τη βάρκα σου ‘used to refer to ungrateful people who, after escaping a difficult situation, forget about those who have helped them’;

πηγαίνει σαν σπασμένη ‘someone who walks with much effort and staggers to the left or right, either because they are drunk or because they are overloaded’;

πίσω Γιάννη τα καράβια ‘used with irony to refer to a person who says or claims different things to what they have said or claimed before’;

ρίχνω έξω το καράβι ‘I led to the bankruptcy of a project or a commercial enterprise’;

σαν σπασμένη βάρκα (like a broken boat) ‘used by a person who is discouraged by his or her own life or by the development of his or her own deeds in response to the following questions: How are you? How are you doing? How is it going?’;

σε βάρκα γεννήθηκες; (were you born in a boat?) ‘an ironic remark to someone who is entering or leaving a room having left the door open’;

την έκατσα τη βάρκα ‘I failed to bring some case to an end, or I found myself in a very difficult situation or condition’;

τον κάνω βαπόρι ‘I made someone very angry, or I made them lose their temper, or I got someone drunk, or I made them drunk so that they were not themselves’;

τρώω καράβια με τις γούμενες ‘I eat a lot’;

χέστηκα κι η βάρκα έγειρε ‘I am indifferent to what has happened or what has been said’.

The semantic analysis of phraseologisms in Bulgarian and Greek revealed a significant number of common phrases that implied pejorative assessments of human character and behaviour. This ranged from slight disapproval to abrupt condemnation; for example, *тежка гемия* in Bulgarian and *αργοκίνητο καράβι* in Greek mean a “tardy, slow person”, and the

Bulgarian *когато корабът потъва, плъховете го напускат първи* and Greek *ὅπως τα ποντίκια το πλοίο* are used to note that “at a crucial moment or a moment of danger, those who are calculating and selfish are the first to flee a dangerous place or to break up with the dangerous or losing parties”. Such dishonest and unworthy behaviour are most criticised. In contrast, phraseologisms that imply a positive assessment of human character tended to be the exceptions. This supports Nazaretyan’s (2009) suggestion that “a person’s positive qualities that conform to the accepted norms of morality and decency are perceived as something implicit which does not require a separate expressive nomination” (p. 19).

4. Conclusions

A comparative study of Bulgarian and Greek watercraft phraseology identified many similarities with regard to constituent lexical elements and structural organisation. This can be explained by the fact that, despite being unrelated, the Greek and Bulgarian languages have been in active contact for many centuries. Semantic classification indicated that phraseological units in these languages are mostly personally oriented, and they are strongly dominated by negative (derogatory) meanings. This corresponds to the emotional nature of phraseology and its role as “a kind of corrective and a verdict over what is ugly and unworthy” (Kaldieva-Zaharieva, 2013: 90).

Based on my assessment of an equal number of selected head words, I conclude that Greek nautical phraseological units significantly outnumber those in Bulgarian. This is related to the fact that in Greece, as an island and port country, the sea plays a much greater role in shaping people’s domestic, professional, and cultural lives.

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Speech-communicative Skills in the Structure of Predictive Competence of Young Schoolchildren with Sensory Disorders

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Abstract

The relevance of this research is determined by the fact that, until now, the issues concerning the study of prognostic competence in speech activity of young schoolchildren with sensory disorders have not been sufficiently studied. This determines the purpose of this study: to identify the main directions of development of speech-communicative function of prognostic competence in children of primary school age with sensory impairments with consideration of the identified specific features. The fundamental method of the study is the analysis of researches studying the speech-communicative skills of primary school age children in the structure of prognostic competence as a condition for their successful socialization, the method of experiment, quantitative and qualitative analysis of the obtained data with the use of mathematical statistics. The experiment involved 43 younger schoolchildren with sensory impairments and 50 younger schoolchildren with no disorders. The study was carried out in educational institutions for children with disabilities and for normotypical children located in Kazan. The research used the methodology called "The ability to predict in situations of potential or real violation of a social norm" which was developed by academic staff of the department of defectology and clinical psychology of K(VR)FU.

The experiment revealed that speech-communication function in younger schoolchildren with sensory impairments is formed insufficiently. The answers of respondents are characterized by minimal verbalization of the forecasts in the form of a simple non-extended monosyllabic sentence or in the form of listing of different verbs, be the poverty of speech-language means, by the absence of other participants in the forecasts, and by the use of verbs of present or past tenses. In addition, respondents had low values in almost all spheres of relations, namely in the area of attitudes toward learning, relationships with peers, in the sphere of communication with adults, in virtual communication, in the spheres of attitude towards illness and relationships in the family. These data indicate low level of formation of the speech-communicative function of predictive competence in younger schoolchildren with visual and hearing disorders.

The analysis of data helped to develop the program of correctional work on the development of the speech-communicative function of predictive competence in younger schoolchildren with sensory disorders. The program uses prognostic tasks presented in forms for recording the answers in the form of pictures. All tasks are divided into 6 areas, which turn out to be the most significant ones for younger schoolchildren with sensory disorders. Each unit consists of three prognostic tasks which the subject is offered to complete. The answers are given orally; the experimenter records the answers of younger schoolchildren in the forms.

The results of the research let us to outline the areas for further research in the field of studying the prognostic competence of younger schoolchildren with sensory disorders of the development with consideration of the socialization space structure.

Keywords: predictive competence, young schoolchildren, sensory disorders, speech skills, communication skills.

1. Introduction

1.1 *Predictive competence*

The issue of predictive competence is inherent in all issues of psychological science itself. In recent decades, thanks to the researches of domestic psychologists, the issue of the specifics of predictive competence in children of primary school age has been actively researched. The wide use of such terms as “anticipation”, “anticipation skills” and “predictive skills” has led to the situation when these concepts are used interchangeably, which makes it difficult to distinguish them and leads to the complexity of conceptual differentiation. Therefore, it is necessary to clarify the interpretation and the meaning of these concepts. Classic definition of “anticipation” in psychology is the one proposed by Lomov and Surkov (1980), who interpret anticipation as the ability (in the broadest sense) to act and to take certain decisions to a specific time – spatial anticipation for expected events. According to Nichiporenko and Mendelevich (2006), the content of the concepts “anticipation”, “anticipation skills” and “prognostic skills” coincides. According to Mendelevich (2005), we need to consider predictive competence as the ability of an individual to anticipate the course of events with high probability, to predict the development of situations and one’s own reactions to them, to act with a time-spatial forestalling. If we consider predictive competence as an arbitrary, deliberate, purposeful activity of an individual, then we can conclude that predictive competence is being formed in the process of prognostic activity.

Lomov and Surkov (1980) distinguish three functions of predictive competence: regulatory, cognitive, and communicative which are inseparable in any human activity.

The regulatory function is aimed at regulating actions when constructing a model of the required future. The role of predictive competence in regulation of behavior and actions is great, since people always tend to predict the ultimate goal of their activity.

Cognitive function is expressed in predicting the course of cognitive processes, for example, in the form of a perceptual hypothesis or an anticipatory pattern.

According to Anokhin, Bernshtein, Brushlinsky and Feugenberg, the communicative function of predictive competence helps not only to exchange information, but also to obey certain cultural values of a group. Any communication and interaction between people, the ability to recognize the emotional states of others, readiness to obey social norms – all of these factors are manifestations of the communicative function (Nigmatullina & Kurbanova, 2018).

Researchers consider prognostic skills as:

- the ability to take actions aimed at getting a forecast (Lomov & Surkov, 1980);
- learnt way of performing mental actions that allows an individual to get early information in order to increase the efficiency of an educational process (Mendelevich, 2005);
- possessing a complex of mental and practical actions aimed at solving prognostic tasks based on deliberate application of psychological, pedagogical and methodological knowledge in real life (Nichiporenko, 2007).

Prognostic competence, in turn, is defined as:

- independent universal polyfunctional pedagogical activity aimed at studying possible trends, transformations and development prospects of subjects and objects of pedagogical activity (Nichiporenko, 2007);
- mental actions that provide early information about the object of the study in order to optimally solve the educational tasks and tasks for the further development of each subject of pedagogical interaction (Mendelevich, 2005);

- special mental state that includes positive attitude towards the fulfillment of prognostic functions, appropriate motives, professional knowledge and skills, personal qualities and abilities required to perform this type of activity (Nichiporenko, 2007).

Summarizing the above, it should be noted that the terms “predictive skills” and “predictive competence” form a synonymic row in which predictive competence has a generalizing meaning.

Thus, prognostic competence is a complex psychological, pedagogical and professionally significant phenomenon that has a certain structure. The analysis of various studies has shown that researchers agree on the identification of three components (cognitive, regulatory and communicative) in the structure of prognostic competence.

1.2 Specificity of speech–communicative function in younger schoolchildren with sensory disorders

General dynamics of the development of communicative activity in children with sensory impairments is being formed in the process of leading activities that change each other and follows the same basic laws as in their peers without the disorders of vision. Visual impairments, which manifests itself in reducing sharpness and clarity of vision, reducing the speed of information comprehension, disrupting the span of vision, oculomotor functions and binocularity lead to the appearance of secondary impairments of mental functions that are closely related to the primary pathology of the analyzer, and tertiary, associated with damaged function indirectly – the disorders of behavior and activities (including communicative activity). Due to the specificity of perception of the surrounding world, the poverty of ideas and visual images of objects and phenomena, the level of sensory experience which determines the content of thought, speech and memory images (Mzhel'skaya, 2013) is reduced. This entails difficulties in mastering the means of communication and their inadequate use which may cause misunderstanding during communication (Nigmatullina & Kurbanova, 2018). At the same time, due to a low self-esteem as a subject of communicative activity, people with visual impairments have certain emotional problems, which leads to the feeling insecurity in communication, poor motivation for making contact or lack of activity and initiative in communication (Mzhel'skaya, 2013).

Many children with hearing impairments have specific features of behavior in the form of increased mental exhaustion, emotional excitability, tendency towards negativity, and motor disinhibition. Some of the younger schoolchildren with hearing impairments are emotionally stunted kids who tend to avoid new contacts.

The lack of communicative competence in younger schoolchildren with impaired auditory function do not let them fully satisfy the basic human need — to be included in society and culture, since communicative competence implies the ability to use all types of speech activity, namely reading, listening, speaking (monologue, dialogue) and writing (Barabanov, 2015).

Thus, the development of speech–communication skills in younger schoolchildren emotionally stunted with sensory impairments plays an important role in the process of successful socialization and development of personality of younger schoolchildren with sensory impairments in general. In particular, it influences the formation of their communication with others and their behavioral responses.

1.3 Research objective

The objective of this research is to study the specifics of the development of the speech–communicative function of predictive competence in children of a younger school age with sensory

impairments; to determine the strategies for its formation on the basis of specific features identified by spheres of relations and bipolar criteria.

2. Research methods

2.1 *Research participants*

The study involved 93 younger schoolchildren including: 16 children with visual impairment studying at Kazan State School No. 172 for children with disabilities and 27 children with hearing impairment studying at Kazan state budget school named after E. G. Lastochkina for children with disabilities, 50 children with normotypical development studying in the municipal budgetary educational institution “Secondary school No. 85 with extensive learning of individual subjects”, located in Novo-Savinovsky district of Kazan.

2.2 *Research methods and techniques*

The development of the speech–communicative function of predictive competence was studied with the use of the method called “the ability to predict in situations of potential or actual violation of a social norm”, developed by the members of the Department of Defectology and Clinical Psychology of the Institute of Psychology and Education K (P) FU: A. I. Akhmetzyanova, T. V. Artem'yeva, A. T. Kurbanova, I. A. Nigmatullina and A. A. Tvardovskaya (2018).

In order to measure the level of the development of the speech-communicative skills, the researchers used data processing methods (quantitative and qualitative analysis of the data based on the methods of mathematical statistics).

2.3 *The course of the research*

The research involved a detailed examination of the speech-communicative function of predictive competence of younger schoolchildren with impaired vision and hearing impairment. Speech-communicative component of the predictive competence is presented in the form of information found in speech models which younger schoolchildren use to determine the appropriate options of choosing their own strategies for building the image of the desired future.

Younger schoolchildren were asked to examine each series of storyline pictures one by one, and the pictures were accompanied by some stories – the description of the situation shown in the pictures – after that, the schoolchildren were asked: “What will happen next and why?” The answers were recorded in individual protocols in the form of a full phrase for further analysis.

The information collected in the course of the study was subjected to mathematical processing according to Student's T-test in SPSS Statistics. The results helped to determine the specificity of the speech-communicative function of predictive competence in younger schoolchildren with impaired vision and hearing, as well as in younger schoolchildren with normotypic development according to the fields of relations and bipolar criteria described in the methodology “The ability to predict in situations of potential or real violation of social norms”.

3. Results

3.1 *The specificity of the speech–communicative function of predictive competence in younger schoolchildren with sensory impairments*

Analyzing the results of the research aimed at determining the level of the development of the speech-communicative function of predictive competence in younger

schoolchildren with sensory impairments according to the areas of relations, we found that indicators in the areas “attitude to learning”, “virtual communication”, “attitude to the disorder” and “attitude to the family” among younger schoolchildren with visual impairment are higher than those of younger schoolchildren with hearing impairment.

In such areas as “communication with peers” and “communication with adults” there is no difference in the average values among younger schoolchildren with impaired vision and impaired hearing, which means that these areas are most highly developed compared to other areas of communication.

Table 1. The results of the study of speech–communicative function of predictive competence in younger schoolchildren with visual and hearing impairment by areas of relations

Scale	Visual impairment (n=16)		Hearing impairment (n=27)		t (43)	p
	M	SD	M	SD		
Attitude to learning	3.67	1.66	1.59	1.23	4.64	< 0.01
Communication with peers	3.31	1.89	2.56	1.74	1.34	> 0.01
Communication with adults	3.13	1.67	2.41	1.97	1.22	> 0.01
Virtual communication	3.88	1.93	2.41	1.85	2.48	< 0.01
Attitude to the disorder	3.86	1.20	2.85	1.86	1.95	< 0.01
Relationships in the family	4.31	1.51	2.74	1.65	3.09	< 0.01

Analyzing the results of the research aimed at determining the level of the development of the speech-communicative function of predictive competence in younger schoolchildren with impaired vision and hearing using bipolar criteria, we found that the values of the criteria “verbalization of forecast”, “speech-language means” and “presence/absence of future tense verbs” in younger schoolchildren with visual impairment are higher than in younger schoolchildren with hearing impairments.

According to the criterion “presence/absence of participants’ statements in the prediction” the average values of indicators in younger schoolchildren with visual and hearing impairments are the same.

Table 2. The results of the study of the speech-communicative function of the predictive competence in younger schoolchildren with visual and hearing impairment according to bipolar criteria

Scales	Visual impairment (n=16)		Hearing impairment (n=27)		t (43)	p
	M	SD	M	SD		
Maximal//minimal verbalization of forecast	6.13	3.01	3.74	2.52	2.79	< 0.01
Abundance/poverty of speech-language means	6.00	2.92	3.74	2.49	2.67	< 0.01
Presence//absence of participants’ statements in the prediction	0.19	0.40	1.00	1.18	-2.67	> 0.01
Presence/absence of a future tense verbs	9.86	3.74	6.04	3.89	3.17	< 0.01

Analyzing the results of the research aimed at determining the level of the development of the speech-communicative function of predictive competence in younger schoolchildren with impaired vision and younger schoolchildren with normal development by areas of relations, we discovered the following: in one of the six areas presented in the study, namely in “attitude to the disorder”, we found difference in average values of younger

schoolchildren with visual impairment and younger schoolchildren with normal development. According to the data collected in the course of the study, the average value in “attitude to the disorder” sphere among younger schoolchildren with visual impairment is higher compared to the one in younger schoolchildren with normotypic development.

Having analyzed the spheres “attitudes to learning”, “communication with peers”, “communication with adults”, “virtual communication” and “relationships in the family”, we can conclude that in the above areas of relations the rate of the development of speech-communicative functions of predictive competence in younger schoolchildren with sensory impairments and normotypical development are about the same.

Table 3. The results of the study of the speech-communicative function of predictive competence in younger schoolchildren with visual impairment and normotypical development by areas of relations

Scales	Visual impairment (n=16)		Normal (n=50)		t (43)	p
	M	SD	M	SD		
Attitude to learning	3.67	1.67	4.14	1.51	1.01	> 0.01
Communication with peers	3.31	1.89	3.26	1.47	- 0.16	> 0.01
Communication with adults	3.13	1.67	3.67	1.27	1.36	> 0.01
Virtual communication	3.88	1.93	2.98	1.27	- 2.15	> 0.01
Attitude to the disorder	3.86	1.20	2.24	1.30	4.45	< 0.01
Relationships in the family	4.31	1.54	3.48	1.57	- 1.86	> 0.01

Analyzing the results of the research aimed at determining the level of the development of the speech-communicative function of predictive competence in younger schoolchildren with impaired vision and younger schoolchildren with normal development by bipolar criteria we discovered that:

According to one of the four criteria of speech-communicative function of predictive competence presented in the methodology, namely, the presence/absence of future tense verbs, the average value of younger schoolchildren with visual impairment is higher than the one in younger schoolchildren with normal development.

Table 4. The results of the study of the speech-communicative function of predictive competence in younger schoolchildren with sensory impairments and normotypical development by bipolar criteria

Scales	Visual impairment (n=16)		Normal (n=50)			
	M	SD		SD	t (43)	
Maximal//minimal verbalization of forecast	6.13	3.00	6.16	2.89	0.42	> 0.01
Abundance/poverty of speech-language means	6.00	2.92	5.92	2.51	- 0.10	> 0.01
Presence//absence of participants' statements in the prediction	0.19	0.40	0.28	0.73	0.48	> 0.01
Presence/absence of a future tense verbs	9.88	3.74	7.42	3.89	2.41	< 0.01

The analysis of the results showed that in such areas of relations as “attitude to learning” and “relationships in the family” there is a difference in average values of younger schoolchildren with hearing impairment and younger schoolchildren with normal development. The values of younger schoolchildren with normal development in these areas are higher than those of younger schoolchildren with hearing impairment.

Table 4. The results of the study of the speech-communicative function of predictive competence in younger schoolchildren with hearing impairment and normotypical development by areas of relations

Scales	Hearing impairment (n=27)		Normal (n=50)		t (43)	p
	M	SD	M	SD		
Attitude to learning	1.59	1.28	4.14	1.51	7.43	< 0.01
Communication with peers	2.56	1.74	3.26	1.47	1.87	> 0.01
Communication with adults	2.40	1.97	3.66	1.27	3.39	> 0.01
Virtual communication	2.40	1.85	2.98	1.27	1.60	> 0.01
Attitude to the disorder	2.85	1.88	2.24	1.30	- 1.68	> 0.01
Relationships in the family	2.74	1.65	3.48	1.57	1.94	< 0.01

Analyzing the results of the research aimed at determining the level of the development of the speech-communicative function of predictive competence in younger schoolchildren with hearing impairment and younger schoolchildren with normal development by bipolar criteria, we found difference in average values of younger students with hearing impairment and younger students with normal development in such criteria as “maximum//minimum verbalization of forecast” and “Abundance/poverty of speech-language means”. The values of these bipolar criteria were higher in younger schoolchildren with normal development compared to younger schoolchildren with hearing impairment.

Table 5. The results of the study of the speech-communicative function of predictive competence in younger schoolchildren with hearing impairment and normotypical development by bipolar criteria

Scales	Hearing impairment (n=27)		Normal (n=50)		t (43)	p
	M	SD	M	SD		
Maximal//minimal verbalization of forecast	3.74	2.52	6.16	2.89	3.66	< 0.01
Abundance/poverty of speech-language means	3.41	2.49	5.92	2.51	3.64	< 0.01
Presence//absence of participants' statements in the prediction	1.00	1.18	0.28	0.73	- 3.31	> 0.01
Presence/absence of a future tense verbs	6.04	3.87	7.42	3.48	1.60	> 0.01

After completing the research, we could develop a strategy for the development of the speech-communicative function of predictive competence in younger schoolchildren with sensory impairments using prognostic tasks.

4. Discussion

The relevance of the issue of creation of strategy for the development of speech-communicative function of predictive competence lies in the fact that successful socialization and integration of younger schoolchildren with sensory impairments is impossible without a developed speech-communicative function since communication is very important for successful socialization of younger schoolchildren with visual and hearing impairment in society and because it helps to form the forecasts.

The goal of the strategy is to develop speech prediction skills in younger schoolchildren with visual and hearing impairments using special techniques and methods for the development

of speech-communicative function of predictive competence. We identified the following objectives for the strategy of the development of the speech-communicative function of predictive competence:

1. to increase the extensiveness of verbal prognosis in younger schoolchildren with impaired vision and hearing, that is, to let them give detailed prognosis consisting of several sentences;
2. to develop the ability to use lexical-grammatical and syntactic constructions according to the age;
3. to develop the use of other participants' statements in the forecast in the form of direct or indirect speech;
4. to teach the use of the future tense in the speech;
5. to develop in younger schoolchildren with sensory impairments the ability to navigate in the proposed textual and visual content when preparing a descriptive story.

The participants of the proposed strategy for the development of the speech-communicative function of predictive competence were chosen among children of primary school age with visual and hearing impairments. The strategy consists of three prognostic tasks that subject need to complete. Answers are given orally. The experimenter records them from the words of younger schoolchildren with sensory impairments in the answer sheets. The predictive tasks in our proposed strategy for the development of predictive competence are presented in the form of picture material and descriptive stories. All tasks are divided into 6 areas of relations which represent the most significance for children of primary school age with sensory impairments.

5. Conclusions

The study revealed that the speech-communicative function in younger schoolchildren with hearing impairments and younger schoolchildren with visual impairment is formed not well enough. After analyzing and comparing the average values in the proposed spheres of relations and bipolar criteria, we made the following conclusions:

1. Younger schoolchildren with impaired vision and hearing use minimum of verbalization in their answers, that is, the answer is more often always given in the form of a simple unextended sentence containing different verbs.
2. The answers given by younger schoolchildren with visual and hearing impairment are mainly characterized by the poverty of using speech-language means, that is, they experience difficulties in using lexical-grammatical and syntactic structures and do not know how to use language means in accordance with given speech situation.
3. In most cases, younger schoolchildren with visual and hearing impairment do not have statements of other participants in their forecasts – only few of them use direct or indirect speech in their answers when talking about other people's statements.
4. The absence of future tense verbs in the answers of younger schoolchildren with impaired vision and hearing – most often they use verbs of present or past tenses.
5. In addition, younger schoolchildren with visual and hearing impairments show low values in almost all areas of relations represented in the forecasting methodology, namely in such areas as attitudes towards learning, relationships with peers, communication with adults, virtual communication, attitudes towards illness and family relationships. These data indicate a low level of formation of the speech-communicative function of predictive competence in younger schoolchildren with visual and hearing impairments.

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Political and Philosophical Discourse on the Border Between the Caliphate and Terrorism – ISIS

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Abstract

The Islamic terrorism has unleashed the migration wave to Europe from the Middle East countries. On 30 June 2014 the extremist organization the “Islamic State of Iraq and the Levant” (ISIS or ISIL) has announced the establishment of a caliphate. With this act its leaders not only has shocked the region and the world, but also they challenged the contemporary Islamic theologians. As a matter of fact, “khalifa” Abu Bakar al-Baghdadi triggered the most important “takfiri”, apostatizing trend within Muslim world. They formed the dogmatic case which brought to the surface the group as a real entity which has long struggled leadership among the other terrorist formations. After the announcement of the caliphate ISIL, it abolished “Iraq and the Levant” from its name and became only the “Islamic state”, and it does claiming their uniqueness to their competitors. This terrorist organization has had a long history in Iraq. It has appeared on the map of extremist actors of still living former dictator Saddam Hussein. Its “birth date” is about 2000 and its creator is the Jordanian Abu Musaab Zarqawi.

Keywords: ISIS, terrorism, conflict, migration.

On 30 June 2014 the extremist organization “The Islamic State of Iraq and the Levant” or ISIL/ISIS has announced the establishment of a caliphate. With this act its leaders not only has shook the region and the world, but also they threw a strong challenge to the contemporary Islamic theologians. They formed the dogmatic case which brought to the surface of the group as a real entity which has long struggled leadership among the other terrorist formations.

After the announcement of the caliphate ISIS, it abolished “Iraq and the Levant” from its name and became the only “The Islamic state”, and it does claiming their uniqueness to their competitors. This terrorist organization has had a long history in Iraq. It has appeared on the map of extremist actors still living the former dictator Saddam Hussein. Its “birth date” is about 2000 and its creator is the Jordanian Abu Musaab Zarqawi. Formation begins with the name of a group of monotheism and jihad. They born in the city Zarka. The religious fanatic already gained combat experience in Afghanistan intends to overthrow the royal regime in Jordan, as it has perceived as un-Islamic. Precisely in this period has created closer links between ISIS and the most significant terrorist organization in Iraqi Kurdistan – Ansar al-Islam (AI). Subsequently, this battle Union became the backbone of the success of the idyll in Iraq. In 2003, the first mass strikes of the USA BBC have caused precisely positions against AI.

In 2005, the formation now has called Al Qaeda in Mesopotamia. Zarqawi has announced this in a letter to Osama bin Laden as a gesture of loyalty to him.

In 2006, The Al Qaeda in Iraq has declared the Islamic state in Iraq and formed a “government”. Among its objectives is the announcement of the Caliphate, but then officially its leaders do not dare to do so. It has declared Ramadi city for its capital. Followed by the killing of Zarqawi in 2006 and the creation of an antialkaydist the “Islamic councils revival” of the local Sunni tribes, the American troops inflict a deadly blow to the Al Qaeda in the country. It has been totally marginalized as Sunni population and the majority of the rebel groups in the Central Iraq have confront to religious extremists.

1. The Caliphate – A stage at formation of the state and the dogmatic case

According to the theorists of the Al Qaeda the caliphate is the last stage of “maturation of the Islamic state”. Perhaps, the most concentrated form a notions and a formation process for the state has developed in the study of Islamic thinker Abu Bakr Naji, *The management of a savagery*. The four stages of the Islamic a formation of the state are the following (Chukov, 2007):

(1) *Stage a puncture*. Case of when they are attacking the polity institutions, the economic facilities, the production facilities, and especially those who are services for the population as the provision of electricity, the water and the supplies. The plans of the tacticians of an alkaydist have been the power institutions of the state of the sunits to be forced to withdraw them control of the national territory. This seems to be the most important stage since then outlines the actual shape of the territorial aspirations. Often behind the seemingly peripheral agglomerations or the businesses, it has concealed the desire of the jihadist tacticians to establish specific administrative center around which to form a territorial unit. The actions of ISIS in Iraq and Syria good revealed that the leadership of the terrorist group highlights the cities of Mosul and Deir Resort, respectively Iraq and Syria as both their local “capitals”. Long Rakka city was been the bastion of the extremists.

(2) *Stage of uncontrolled chaos*. Case of the shaping territories which the state cannot control without it to have any real institutional control. Practically implement some kind of mixed, hybrid, secular state control. Regardless of ignoring its form and nature, the ISIS jihadists has forced to accept the consequences of management secular regime. This is especially true for the economy and with even greater force to the energy, which is the most capital-intensive sector. For example, long ISIS has controlled the three major dams in northern Syria – “Baath”, “Euphrates” and “Tishrin”. At the same time, they continue to function, albeit with reduced capacity. They supply electricity to consumers, no matter that they are under state control. The most interesting is that the salaries of staff working in them continues to be paid by the government in Damascus.

The same applies to the oil production. For example, the religious fanatics sell the extracted material from their control wells in Syria of the few still operating factories and plants in the country. According to Sammy Abderrahmane from the Syrian Laboratory of Human Rights the price of a barrel of them target is reduced to 10 dollars per barrel. Meanwhile, the head of the organization the “Economic activities in Syria”, Osama Kadi, believes that between the extremists and the regime in Damascus has signed a “meaningful agreement”, which guarantees the purchase of Syrian oil by the government. Along with that, if buyers are Iraqi entrepreneurs who transported fuel in tanks, the price will jumps to 20-40 dollars¹. Usually the affair in question of the Kurdish

¹ Al Mirsad: Daash yuibiya en naphth- assistant Suras lil tuzhar irakiyun, The laboratory: The ISIS sale the Syrian oil of the Iraqi traders Safir, <http://www.assafir.com/Article /5/362439>. Accessed 30 November 2018.

smugglers who subsequently resell to larger firms in Turkey, without the knowledge of the authorities.

(3) *Stage to management a savagery*. Implemented management of sites of the mujahideen, but outside the normal worldly standards. This stage remains unidentified and often enough some theorists even equate it to the final phase, i.e. the ideal state.

(4) *Stage of be able to*. This is the creation of an ideal medieval state, i.e. the Caliphate laws, a courts, a borders, and the other city regulations. ISIS medieval strictly rules only to the territories in which they believe is done unconditionally their power. So far, the first time the require public lynching militants stone the woman from the town of Tabaco, near Deir Ezor. The woman has accused of an adultery.

The great discussion among the experts whether ISIS will realize this form of statehood in the Iraqi territory. The expert from the Washington Institute for Near East Policy Michael Nayts notes that the Caliphate of ISIS became the richest terrorist organization in the poorest country in the world. The organization is controlled 60% of the oil reserves of Syria and two small wells in Iraq. The potential petro-caliphate yield is about 80,000 barrels per day. By the prices on world markets, this means about \$ 8 million per day. Logically, however, this does not happen, especially after the decision of the Security Council of the United Nations purchase of oil from terrorist organizations such as the Al Nusra and the IDYLL to be declared for a crime. The responding to the State Department in Iraq, Brett McGurk notes that even before the capture of Mosul that organization had revenues per month of \$ 12 million, mainly by collecting an illegal charges, racketeering and by the other criminal activities (Johnson, 2014). Normally, however, to be padded claims for the statehood costs to be aimed at ensuring the needs of the population living in the areas controlled. Mostly the affair the question to ensuring the services in those the regions which have been long marginalized by the central government. Exactly in them have to create a social vacuum to be filled by Islamist organizations such as the Muslim Brotherhood, Hamas, Hezbollah, which are expanding their popularity and the public support. Currently ISIS spend its revenue target to buy the loyalty of some tribal leaders or to bribe the chiefs of the other Islamist groups, which fought a side by side in Iraq. But the biggest challenge facing the new petrol state, however, remains the decision of the Baghdad government to suspend the payment of salaries of civil servants, for unlike Damascus. If ISIS disrupt the natural daily rhythm of life of the population in these areas, very soon the Caliphate will burst as quickly the inflated balloon. According Nayts it will most likely happen, because the new country cannot compete with the Iraqi state, whose daily production of the oil is about 3 million barrels, which is about 120 billion dollars in the annual revenue.

The announcement of the Caliphate of the ISIS leader Abu Bakr al-Baghdadi cause many reactions and the dogmatic disputes. Among the authoritative Islamic theologians of the famous in Cairo the Al Azhar University, widespread view that the Caliphate is preaching institution, not a political one. This refers to the professor in this university Karima Ahmed due to quote the prophetic hadith: “the Caliphate according to the prophetic program, then come the kings”. Thus, according to another professor Dr. Abderazak Sanhua, Caliphate in the modern world is not possible.

Another the authoritative Facchini Alawi Amin directly states that the ISIS was created by the CIA and other the Western intelligence plants to cause a civil war in the Islamic world.

The actions of the leader of the ISIS contrary to the sharia norms and thus obtaining the dogmatic nonsense. Ibrahim al-Badri, who is the real name of Al-Baghdadi has adopted the name of the first righteous Caliph – Abu Bakr and he has declared for the heir to the ideas of Ibn Time. The latter is a Syrian theologian from XIII-XIV century. He is the undisputed authority in the Islamic dogma and a consensus he is seen as one of the ideological pillars of the Salafi current. According to Ibn Time, however, after the four righteous caliphs in early Islam (632-660) should

not to talk about “The Member caliphate” and for “The Member sharia”. Then the holder of power is more appropriate to name the Malik, i.e. the King, not the Caliph. He is based on the prophetic hadith “The lasted only thirty years, then comes the kingdom”.

In a video of Osama bin Laden in 2005 the latter has sworn allegiance to Mullah Omar, the leader of the Afghan Taliban. He explains the case and his behavior with the texts of Ibn Time. The latter notes that “the oath be taken before the man who conquered a country among countries in the world. This is sufficient and does not require fulfillment of the other conditions, while the leader is a Muslim”. Such an approach is possible only within the hanafits and the Sunnitand its the right dogmatic school. It is a “non-Arab” Sunni school.

At the same time, the radical theologians normativists as they mostly the hanbalits the right dogmatic school, they challenge this position and note that the prophetic hadith, “The Imams are always kureysh”, is mandatory and so Mullah Omar cannot be a political leader. This yields a conflict between the radical “Arab” Sunni schools (hanbalits, shafayts and malikits) and the “non-Arab” hanafits, Sunni school on the question of the political leadership. Can nearabin be a political leader?²

For example, the late Mufti of Al-Qaeda al-Libi Atalay noted that “the imamatat of Mullah Omar is not ‘big’, and he is the master of the faithful only within its territory”. As a results of this, arises a conflict between the warlords – Osama bin Laden and his mufti, today a both deceased. Bin Laden said that every Muslim must to give an oath of allegiance, i.e. the political oaath someone. Otherwise, the Muslim remains the Jahan, ignorant, i.e. outside the faith.

Sheikh Asim Barkawi or Abu Mohammed al Makdasi, the spiritual father of Abu Musaab Zarqawi, also criticized the announcement of the caliphate. He said: “You sons of the groups and the organizations, the warriors of Allah, to know that after the announcement of this caliphate your struggle is no longer legitimate”. In the dogmatic dispute his intervene the Head of the Directorate of Religious Affairs in Turkey Mehmet Gormez. He also rejects the legitimacy of the caliphate of Al-Baghdadi. However, he makes the other position. The Turkish theologian asserts that the irakqi nothing to do with the family tree of the Turkish sultans who were called “The Caliphs”. He believes that it is the rulers of the Ottoman Empire are the legal heirs of the caliphate, which was abolished in 1924³. Moreover, Gormez even believes that his opinion is the most fair, as he and the Directorate are descendants of the institution Sheikh al Islam. The latter was required to confirm the legitimacy status of the Turkish sultans. So the senior Turkish theologian has claimed to the most faithfully legal dogmatic opinion in the Islamic world on the basis of the claim for possession of the inheritance rights of the former institution of the Chief Mufti in Ottoman Turkey. So according to him, the Caliphate during the Ottoman period is completely legitimate and not “the sleep” caliphate as perceived by many Arab scholars.

The Saudi King Abdullah also is condemning the ISIS. In its statement of the religious extremism of the group, he has expressed these thoughts: “It is a shame for these terrorists, what they did in the name of religion. They killed the soul, although The Allah forbids it to be killed. I am proud of it and I distribute it. For them the religion is the pretext of innocence. They deformed

² The Hanafit legal dogmatic Sunni school is the only the Sunni school which that allows to non-Arab to be a political leader. For this reason, the majority of non-Arab, converted to the Islam Nations adopted precisely to the hanafit. It's about the Turks, Malaysians, Indonesians, Indians and others.

³ Turkey's Top Cleric Call New Islamic “Caliphat” Illegal, Today's Zaman, http://www.todayszaman.com/national_turkeys-top-cleric-calls-new-islamic-caliphate-illegitimate_353734.html. Accessed 30 November 2018.

perception of the religion in its purity, virtue and humanity. They stitched it all bad qualities, thanks to the actions tyranny and their crimes”⁴.

At the same time competitors from the Al Nusra announced firmly that he would soon announce the “emirate” which to be subject to Mullah Omar, as Al Qaeda led by Ayman Zauhiri.

2. The military aspects of a difference between the salafit-dzhihadist and the salafit-uhabist

Early in 2014 the main sponsors of the Islamic militants in Syria – Saudi Arabia and Qatar, felt that the ISIS is not an organization which is subject to control. The several experts stressed that the staffing its conception at the end of 2011, when the Syrian regime released many convicted Islamists from a prison in Sidnaya. Even some the leaders of the rival Islamist militias in the famous prison inmates. Remain a guesses why the Intelligence Damascus launches this criminogenic contingent right now moment. In some analyzes was launch the thesis that actually the Islamist regime creates The Frankeynshtayn, to prove that his opponents are actually the Al Qaeda. The aim is to alienate the public opinion and the international opposition. The proven experts found that so far the Syrian army and ISIS are living in the “honeymoon”. The battles are mostly with other insurgent groups. Even the key military victories of the national army last year primarily have due to the “unexpected tactical retreat” of the ISIS in the construction of a common defense line on the insurgents. Then the ISIS was ruled out by a military general of the opposition. After the seizure of oil wells and the gas fields in Eastern Syria, the two armies began real battles with each other.

The former “vali” of sham the Badia created by ISIS, Sheikh Maher Abu Ubeyda maintains that in fact it was the strategy of formation. The aim is to the first subject the other Islamist organizations being forced to flow into the structure of this terrorist group. Only in a second stage, the ISIS planned a clashes with the regular Syrian army. It is necessary to add one more a reason for the “absorption” of the small formations ISIS – the financial. The Pro-Saudi and the Pro-Qatari formations are dependent on the external sponsor. At the moment when the slow monthly salary dissatisfied with their pay mercenaries immediately switch to the ISIS as a solvent.

The dissident of the ISIS has predicted that this formation will quickly retreated from its positions in Syria, because “it has departed from the goals it has set itself, which has become in the militia of mercenaries, stealing oil and left the right path”. According to him, the ISIS was tricked by the money and the material benefits, attacking and conquering the only oil and gas fields in Syria. He provides that the militants would leave Syria after about a year and will focus their efforts to the Saudi Arabia. The reason for this is the fact that many members of the ISIS’s were subjects of the Saudi King Abdullah. In the country they had already created a “sleepers cells” in the Qasim province and the cities Khamis machine, Dammam and Hufuf. Not surprisingly, the military commander of the organization is Saudi Arabian Shakir Uahib, the spokesperson – his compatriot, the 26 year old blogger Abu Mohammed al Adnan⁵.

⁴ Adu Para Cada wa al ulema umma.... I appeal to the leaders and the scholars of the nationAl Ikaz, <http://www.okaz.com.sa/new/Issues/20140802/Con20140802715656.htm>. Accessed 30 November 2018.

⁵ Abu Maher himself Ubeyda on July 9 declared himself the caliph of Syrians who are in the ISIS. He calls the “Caliph” Abu Bakr Baghdadadi degrading circulation the “Rephidim”, the denied which used by the Sunni extremists to Shiites. Apparently he alludes to some Shia regard the origin of Baghdad. Halyabi, A., Kiyadi Daash ace sabik lil Safir: Saud al hadaf al mukbel lil Kansai, Former the Head of the ISIS: the Saudi Arabia is the next objective of the organization, Safir, http://www.assafir.com/Article/5/363_602. Accessed 30 November 2018.

Saudi Arabia has begun to restructure the backbone of the Syrian armed opposition after their apparent losses on the battlefield by the Syrian army. The Saudi sponsors launched with the leaders of the main Islamist groups called the “Document of the revolutionary honor”. In it has spoken of the unity of the Islamic opposition against the regime of Damascus. This move is actually a type of test in which select for Riyadh muzhdahidinite of “acceptable” or “moderate” and “unacceptable” or “radicals”. Very end of the document calls for the support of future the “civil state”, which the authors do not mean a secular state and not contrary to the Islamic law. The only organisations that refuse to sign the relevant document are the ISIS and The Al Nusra. So those who sign such a platform for the future action, distinguishing simultaneously from the regime and the al hauridzh, sectarians (as started calling ISIS) united in the “Islamic Front”.

The renowned Pakistani analyst Hamid directly Zayd said: “The idyll and the terrorist groups around them are Sunnis, Kharijites, and heretics who serve and anti-Islam imperialist agenda”. It is interesting that even such the famous Islamist thinkers close to Al Qaeda as Abu Tartus Bashir and Adnan al Arur said that this organization is not professes the Sunni Islam⁶. In contrast to the contradictions between the ISIS and the Sheikh Yusuf Kardaui who embodies the traditional ideological dispute of the Salafism – The Muslim Brotherhood, the last two fakihi recreate dispute between different currents inside the Salafi school – the jihadism (the deviant alkaydizam) against the Wahhabism.

Strong effect achieved and the criticism of the American Arabist-Islamist Kenneth Barrett for the no sunist reveal nature of ISIS. He reveal to these sunist practices of the ISIS, namely the rape of women by the Shia and the Christian confessions, eating the internal organs of the dead enemies, practicing the sexual jihad in which the marriage shall be terminated after 30 minutes after its consumption, crucifixion of the Christian priests strangulation of a woman to death, the killing of civilians and mass execution of prisoners (Barrett, 2014). For some of these crimes remains highly doubt, because they have not been identified by several the authoritative information source. The conjectures remain within the terminology and conceptual profiling crimes as the author ascribes to them the Salafists-Wahhabism as a whole, it is a leading doctrine of the Kingdom of Saudi Arabia. Barnett has not told about the Salafists-jihadism, which is another layer of the radical Islam, according to the agreed EU classification. The point is that the publication is the website of Press TV, which is an Iranian broadcast media and always sharply critical materials conceptual opponent of the Islamic Republic of Iran – Saudi Arabia. The impression remains that in this case the negation of the ISIS is based from the Shiite-dogmatic positions.

The main differences between the ISIS and the “Islamic Front” in Syria (pro-saudite) can be summarized in the following several points:

(1) The ISIS kills all who profess the differently Islam from it, even and the Sunnis. The others do not kill infidels – Shiites, Alawites and Christians, if they do not attack.

(2) The other Salafists do not kill women, children and the old people, even if their relatives were killed or a fought against them. The ISIS kills these categories of the people according the text of The Koran: “Attack them as they have attacked you”. So the ISIS has perceived the collective guilt, which as the legal institute Sharia law is a remnant of the old Islam.

(3) The ISIS organize its own the state – the courts, the daily behavioral principles, the short hair for men, the full coverage of the bodies of women, the ban of alcohol and tobacco, ban on the wearing modern clothes, etc. The other Salafis are aim the first overthrow the secular regime and only later take to create a state.

⁶ Adnan al Arur yarud but daash, Adnan al Arur strikes the ISIS Mustashar, <http://almustashar-iq.net/index.php/permalink/34689.html>. Accessed 30 November 2018.

(4) The ISIS does not contact into direct the military confrontation with other mujahideen who they described as “the sufficient”. Generally early ones in Syria are treated only the Al Nusra. The other Islamic militias they do not trust. Over time, however, the Al Nusra themselves in a category of the apostates. The battle of the city Shahi, Syria, which is a bastion of the Al Nusra in July 2014 proves this fact. The captured fighters to Al Nusra to be forced to disarm and then to go to the ranks of the ISIS. Even they are forced to change the field and the religion training of the ISIS because the commanders of the ISIS do not trust of their training camps.

(5) The most members of the “Islamic Front” Syrians until the ISIS are Iraqis and foreigners. For example, one of the leaders of the operation to capture The Cair gas field, near the city of Palmyra, Syria Abu al Lachemann and alma Galha Abu al Alma, the latter is known for his nickname “the repentant singer”. Of the nicknames of their shows that are mujahideen with German passports.

(6) The membership of the ISIS and the Al Nusra is much more complicated than in the other Islamic groups. To be accepted member of these groups require consensus of the members of the operational management. Then pass a course in the military science and the religious education, consisting of 3 to 6 months.

(7) The members of the idylls always dressed in the Afghan clothes, they never smoke and they sit not down to a smoker, they do not listen to music, they have a long hair and they are not shaved, while the other mujahideen who smoke, haircut and in to wear the modern clothes.

(8) The ISIS recognize not the national borders, while the “Islamic Front” is a Syrian and even comply with the limits of internal administrative division.

(9) The ISIS has influence in the North-Eastern Syria and parts in Aleppo, Edleb, Rakka and the Deir Ezor, and in the separate villages around Damascus. The “Islamic Front” is distributed evenly across Syria.

(10) The ISIS applies the Islamic law as soon as it considers that the priority is the creation of an Islamic state – the caliphate. The “Islamic Front” first wants to overthrow the regime of Bashar al-Assad and only later will create the Islamic state.

(11) The ISIS is trying to conquer the oil wells, as there are limited funding sources from the Persian Gulf. The “Islamic Front” applies the classic military tactic played in the formation of fronts, as it is entirely dependent on external funding – mainly from Saudi Arabia and Qatar.

(12) The mujahideen of ISIS have a great military experience, as they are former fighters in the other countries of the global jihad, namely Afghanistan, Iraq, Bosnia, Chechnya and others. The members of the “Islamic Front” gain experience from the date of the outbreak of the revolution in Syria, that since 2011.

(13) A number of the experts believe that the ISIS was created largely by the regime in Damascus and therefore fight fiercely against him. Another is the case with the regime of Nouri Maliki in Iraq, where unfolds all it's the military might.

3. Scars of the Caliphate state – Denial of the national identity

The ISIS in its actions is downright the xenophobic in the broadest sense. The many experts perceive it primarily as the antishiit organization, although their hatred against all the ethnoconfessional minorities. Wherever it conquered areas populated by Shiite it's the members drove them or impose and the Christians a tax the “jizya” ever paid in the Islamic countries from all non-Muslims. A similar tactic is practiced both in Iraq and in Syria. The often actions when are against by the Sunnis who are suspected of collaboration with the rival militias. For example, were

However, they focus first few strikes against followers of the Christ remained in Mosul, the city of more than 30 churches. Some the Christian churches date back 1,500 years. On 19 July 2014 the extremists have driven the Christians from Mosul. In a statement published on the Internet, fanatics give 24 hours of 25-thousand followers of this religion in the city “to adopt the Islam, to pay ‘jizya’ (without a specified size – note. the auth.) or to leave the city”. The provided an option to pay the tax only medieval figurative. In the position of the ISIS is stated that henceforth “the property of the Christians are the property of the state and that they should leave the village with their clothes”. The ISIS violates sharia norm followers of the Scripture professing monotheism – the Christians and the Jews. It performed segregation gesture of marking on the door of the tabernacle of the infidel’s letter “nun”, the first letter of the word Christian, para shitty. Moreover, it is written the sentence “This house is owned by the Islamic state” (Masihiyun, 2014). The Archbishop to Kaldea of Iraq and the world Louis Sacco notes that this is the first complete cleansing of Mosul of the Christians⁸. Only 25 families have dared to stay in the city. Eventually, after the disapproval of the local population, especially the other Sunni insurgent groups, the Christians have defined the sum of \$ 450 a month to allow them to stay in their homes.

Frankly, the antishariat actions of the ISIS has complement and the ethnic cleansing of the Mosul, the cleansing to aimed at the Kurdish inhabitants who profess the Islam in its Sunni form. According Side Mamuazini – the Representative of the Democratic Party of Kurdistan (Messaoud Barzani) on 22 July 2014 the extremists to do an ultimatum to nearly half a million people in the city of the Kurdish origin to leave the village or else be killed¹⁰. All this will cause another the wave of emigration, especially to the territories controlled by the Peshmerga, the Kurdish troops.

¹⁰ Abdullah, D., Baad al masihiin daash yandor acres given Moseley, After the Christians the ISIS warns Kurds in Mosul Sharq al-Awsat, <http://www.aawsat.com/home/article/143976>. Accessed 30 November 2018.

To ask a question when it will attack the State of Israel in the Tweeter, one of the leaders of the ISIS notes that for his organization the first target are apostates, *murdadiyn*, i.e. Shia and the Sunni-traitors, then comes the order of the original infidels *para para asliyn* case, i.e. the Christians and the Jews.

Already in the first days of the occupation of Mosul the extremists have created the “urban paper” kind of statute which regulates the habits and behavior of the population. In its very clearly says that from now people will live in the city as he lived in the time of Abu Bakr Kureishi (632-634). Firstly, it is a ban on alcohol, tobacco, carrying modern clothes, the women should wear the burka, to go outside the home only when needed and the prohibition to use perfumes and lipsticks. The five prayers a day are required for this purpose religious police monitor whether traders have closed their shops during the ritual. Obviously it is practiced in smaller cities like Rakka, while in thee Mosul millionth few members of the ISIS fail to strictly follow the implementation of this religious practice. According to the story to left the town professor of history Buheyra Sabuni after the meeting with the Rector of the Mosul University, the representatives of the organization said that the first step to comply with the new conditions will be the closure of the Law Faculty and the creation of individual student flows for men and women. Furthermore, the formation specialists will review the curricula of academic institutions and if necessary, will be closed and more the faculties (Abbas, 2014).

Obviously invention of the deviant Islam, which is practiced ISIS application except the circumcision for women (usually practiced in areas the peripheral Islam – Yemen, Nigeria, etc.) and a kind of the “janissaries’ law”. The caliphate in Mosul authorities have informed the population that should be factored into their ranks. The exact text of the order is: “If a family has three sons, the mandatory one must enter into the composition of the ISIS. Otherwise, the family will have to pay a monthly fee”¹¹.

Another perversion of the religious extremists in Mosul is the use of the “marriage jihad”, a phenomenon known among jihadist groups in Syria. In 2013, the Tunisian Salafi preacher issued a fatwa under which women can perform jihad, satisfying the sexual needs of the mujahideen. It has caused dozens of the young Muslim women, mainly from Tunisia to go to Syria for the purpose. According to the Egyptian Ministry of waqfs and the prominent Islamic dogmatists it’s kind of slavery and legalized trade in white flesh. In late July 2014, just before the Ramadan Bayram, the terrorists of ISIS invited residents of Mosul to provide their daughters called the “Marriage jihad”¹².

4. The ethno-nationality hybrid

In essence the creation of a caliphate is a prototype of the Iraqi Sunitistan, which is derived from a kind of the Sunni intifada. The Iraqi Sunnis across its regional, professional and ideological palette are marginalized by the authoritarian government of this the Prime Minister Nouri Maliki. They asked of him his place in the power and formed a common front.

In fact, the experts say that the ISIS formed only 30% of the Sunni troops as dominant nuclei are those of the indigenous tribes, the former Baathists, the officers army of former dictator Saddam Hussein and the several insurgent groups as the “Ansar Sunnah ace”, the army “Nakshbendi”, the “Tauro s tishrin” and others. Special the Sunni tribal leaders once were attracted by the Americans in the so-called “madzhalis ace sahua” the “Advice revival” which

¹¹ Majlis al AMH Kallik but.... The Security Council expresses concern about Akhbarak, <http://www.akhbarak.net/news/2014/07/23/4725580/articles/15947659>. Accessed 30 November 2018.

¹² Abderrahmane, W., Al aukaf al masriya. The Ministry of waqfs of Egypt Sharq al-Awsat, <http://www.aawsat.com/home/article/150906>. Accessed 30 November 2018.

aimed to counter the Al Qaeda. I.e. the Americans paid the local sheiks and their guaranteed privacy. After their withdrawal at the end of 2011, Nuri Maliki refused to continue this practice and the consequently tribal leaders joined the Sunni extremists. It was clear the confessional confrontation – the Sunnis against the Shiites. Currently, the United States considered that they should be formed again the “Advice of rebirth”. According to expert estimates they should number about 100,000 people. The issue of their funding remains open.

According to the American sources, the total number of the ISIS is about 10,000 people, 3,000 in Iraq and around 7,000 in Syria. According to a former field commanders of the ISIS Syrian Maher Abu Ubeyda, the members of the organization in Syria are no more than 10,000 people and killed in this country are about 2,000 fighters. The Moroccan Interior Minister Mohammed Hisad noted that 1,122 compatriots fought in the composition of the ISIS are Moroccans with the European passport in the organization and the other Islamist militias in Iraq and Syria were about 150-200 people. 128 people have already returned to their homeland, more than 200 were killed and more than 20 people have committed the suicide bombings. As opposed to other parts of the Arab world, the Minister Hisad noted that the announcement of the caliphate was of a great public resonance in his country. Particularly among the Salafi circles. In this respect even appears the Islamist entity whose acronym in the Arabic tries to imitate ISIS. In the Arabic language is the last DAAH and newly the Moroccan organization called DAMS. The experts predict that stands for “The Islamic State in the Islamic Maghreb” or “the Islamic state in Egypt and the Maghreb”¹³.

The sociologists add that the majority of the Moroccan jihadists are called the “Khalidzhie”, i.e. Moroccans who live and work in the Gulf. In their homeland they begin to feel uncomfortable. The Moroccan scholar of the Islamist movements Idris odd notes that “the kingdom turns grave for the members of ISIS after their return home with its parties, the civil society and the moderate Islamic culture”. The expert adds that the Moroccan jihadist group has come to the fore particularly in Iraq, but not in Afghanistan (Al Tahami, 2014). It is possible to created a distrust of the Al Qaeda of Zauhiri as the successor to Osama bin Laden, who personnel marginalized the Moroccan group in military operations in Afghanistan. There the subjects of the king are mostly noncoms and not actively operating on the battle line. Therefore, the Moroccans are grouped in particular of the ISIS, but not of the Al Nusra, which is indicated by the competitor and Ayman Zawahiri – the authentic representative of Al Qaeda. Thus the ISIS advantage of the desire of those Arabs absorbed the conservative mores of the Arabian Peninsula to perform “miracles” and prove to be heroes on the battlefield.

The Chechens are specific contingent in the ranks of the Islamists in the Middle East. Predominantly the presence of this ethnic community in Syria is formed in two social groups:

(1) The former students who come to study the Islamic religion and the Arabic language;

(2) The emigrants from the Valley Panki who are undesirable of the current pro-Russian Chechen President Ramazan Kadyrov, Georgia and Russia. Initially, the leaders of the “Islamic Emirate of the Caucasus” does encourage not the young people to go to the Chechen Jihad in Syria, because they believed that it must first be free their country. Subsequently, however, encourage them, because they take their stay in the Middle East as a form of training and tempering in the real battles¹⁴.

¹³ Dams but khuta daash. The DAMS through the ISIS. Al vito, <http://www.vetogate.com/1088756>. Accessed 30 November 2018.

¹⁴ Limada yukatilun ash shishaniyun fi Surya. Why fight the Syrians in Syria? Islamiyun, <http://islamion.com/news/11501/>. Accessed 30 November 2018.

The Chechens remain divided between the ISIS and the Al Nusra. The total number of Chechens in this Arab country is estimated at about 200-300 people. One of the legendary commanders of the IDYLL (the emir of the North Front) is Abu Omar al Hihani¹⁵. The local muzhdahidini even call it the “Defense Minister of Syria”. The little battle group calls itself the “Sabri” and is also oriented towards the ISIS. At the same time, Abu Mohammed al Dagestan – the leader of the group the “Caucasus Emirate” operating in Syria, strongly supports the Al Nusra. The reason for this is that he is loyal to the Al Qaeda of Ayman Zauhiri and he is named as the Al Nusra’ legitimate representative of the Al Qaeda in Syria. Heself al Dagestan sharply attacked Abu Omar al Hihani, accusing him of that he has not enough combat experience as coming to jihad in Syria.

The battle glory of the Chechens in Syria is the responsibility of the specific brigade which called the “Al muhadzherin wa al Ansar”. The leader is Salahedin al sHihani and his deputy is Abu Asma al Dagestani. In early June 2014 he released a declaration. In the declaration said that despite signs he has not intention of leaving the Syrian territory and remains active on the battlefield in a battle against the regime of Bashar al-Assad¹⁶.

There are also small groups of the Chechens such as the “Jane paragraph hilaf” whose creator and commander is Seyfu Alla al Hihani. He was killed at the beginning of 2014. He was sworn allegiance to the Al Nusra, shortly before being liquidated. It is interesting to note that in April 2014 the fighting in the North-Western Syria, in particular against the city Kasab, is led by several the Islamist groups whose the local warlords are Chechens. The case in point about the local emir “Ansar ah sham” Abu Musa ah Hihani on “Dzhunud ash sham” – Muslim ah Hihani¹⁷. Interesting is that the field commander of the “al-Ahrar ah ham” in the vicinity of the neighboring city of Latakia is the Syrian Abu Hassan at Tabucchi. He also holds a Chechen connection, because he is brother of Yasser as Suri. The latter is the only Syrian involved in the terrorist attack at the Moscow theatre “Dubrovka” in November 2012, when a Chechen extremists group led by Movsar Baraev held three days more than 850 hostages.

It is interesting that the experts talk about the Uzbek group entitled the “Imam Bukhari” and whose leader Mohammed al Tashkent also killed around Aleppo. The Chechen fighters have boast incredible combat capability and the extreme cruelty. Among their traditions is to take not a prisoner. For example, in August 2013 namely the Chechens brigade “Al muhadzhirun not ya al Ansar” they failed due to suicide bombing to conquering the strategic Mazak airport near to Aleppo and to suspend the advance of the Syrian army. Witnesses noted that the Mujahideen have killed all the captured soldiers¹⁸.

¹⁵ Abu Omar al Shisha is Georgian and his real name is Tarhan Patrikashvili. He was born in 1968 in the village Birkiani, Pankiskata Valley, Georgia. His mother is the Pankiskite Chechens. He professes Christianity to 42 years. He participated in the First and the Second Chechen Wars. In 2008, he joined the Georgian army in the conflict with Russia. Then he goes to fight in Chechnya. When he was passed through Egypt and Yemen he went to join the ranks of the ISIS in Syria. They say always carries with it a suicide belt. Majali, N., Abu Omar al-spit Abu Omar bus Elaf, <http://www.elaph.com/Web/News/2014/7/919697.html>. Accessed 30 November 2018.

¹⁶ Bayan al Awale Lil 'mukatilin al azhanib. The first declaration of foreign fighters. Safir, <http://www.assafir.com/Article/5/353927>. Accessed 30 November 2018.

¹⁷ Muslim al-spit He is the former Soviet troops in Mongolia. Participates in the First and Second Chechen war. He became a member of the Advisory Council of the Chechen Republic of Ichkeria in the leadership of Aslan Maskhadov. Fights and legendary field commander Khattab Saudi (his real name is Tamir Sueylam) He is one of the organizers and planners of suicide terrorist attack in Vladikavkaz, North Ossetia in November 2008.

¹⁸ Al Matar choir yadrab Mazak al Askari. The free Army struck military airport in Mazak. Al Arabiya, <http://www.alarabiya.net/ar/arab-and-world/syria/2013/>. Accessed 30 November 2018.

After the announcement of the caliphate and call the Caliph Abu Bakr Baghdadi the Muslims to return to the lands of the Islam, the ISIS has declared that they were joined by 370 Mujahideen. Among them is the smallest terrorist organization “Abu Muhdzhen at Taifi” of Libya, which sent 50 people to the ISIS. That extremist entity participated in the battle for the Libyan city Benghazi on the side of the Islamists against the forces of General Khalifa Haftar.

To note is the partial or the moderate support for the ISIS after the announcement of the caliphate. At this stage the battle between traditional center presented by the Al Qaeda of Ayman Zauhiri outweighed over a periphery embodied by the caliphate of Abu Bakr Baghdadi. The oath of allegiance to al-Baghdadi was declared by the group the Al Qaeda in the Maghreb under the leadership of Mufti Sheikh and the organization Abu Asim Abdullah al. Experts note that it has received a split in the ranks of extremists, as field commander Abu Musaab Abu Udud remains the loyal to Zauhiri. At the same time, support to the ISIS declared in Gaza a small group the “Ansar al beit makdas’ group “Ansar al-Shariah” in Yemen led by Maamun Hatim part of the Taliban in Pakistan under the leadership of Abu Yazid al Kurasani, the part of the “Ansar al-Shariah” in Tunisia. On 25 July a small the Sudanese Salafi group which was called the “Itisam was Kitab wa Sunnah” splinter in 1991 by the Muslim Brotherhood also declared allegiance to the new caliph.

5. The EU current measures at fighting jihadism of the ISIS

As a nearest geographical region Europe is directly injured by the strengthening of the terrorist wave in the neighboring Middle East. For this the experts use the term “returned from ...” which to apply more to Europe than to the very Arab region and individual countries in it. The EU opposition against the jihadists in particular those of the ISIS was assigned to the group, it was headed by the chairman of the general “anti-terrorism” in the EU Gilles de Kershyov. Made the specific plan whose contents remains open. Empirical data, the analysis and targeted measures are summarized in a report in a volume of 14 pages. The document shaded signs of opposition to the EU and the jihadists and to have formulated various current proposals referred at the Union and the national level. In general terms the recommendation is to set a time-consuming job. The report noted: “The Europeans must be prepared in the long time plan to achieve full coordination among themselves and attract their work all state institutions to allow their actions to be effective” (Ibrahim, 2014).

In late 2013 a group of the EU with de Kershyov at the head started realizing of visits in individual the member states of the union, and in some Arab countries such as Qatar, Saudi Arabia and Lebanon. Kirshyov requests information about the main topics of discussion “The Center for Intelligence Analysis” to the EU, even before he has meeting with individual heads of countries in the Gulf. This approach is becoming a major prerequisite for businesslike meetings, as they are cleared the burdensome political elements. Of the Europeans is clearly that always seems bifurcation the “national security – the human rights” as a severe problem in this type of conversation.

The most disappointing are the contacts in Doha. It is clear that Qatar has no intention to cooperating effectively with the Europeans. The result of the talks between the two countries is estimated to be the “complete zero”. The antiterrorists EU have reached the conclusion that the reason for such behavior is that the Emirate will own internal problems with the mujahideen fighting in Syria. Their main goal is the overthrow of Bashar Assad and not that of the Emir. At the same time, Kirshyov said in his report that the “cooperation with the Qatari authorities remains necessary because this is a country which funded various groups fighting in Syria”.

In turn, Saudi Arabia occupies considerably more balanced position relative to that of its neighbor. The state itself has claims to play a role in global fight against terrorism and

extremism. Therefore, in 2004 an international conference the Saudi King offered to create a “Global Center for Combating Terrorism” and its headquarters is in Riyadh. In all cases, the authorities in the country remind for its proposal not so much as waiting to take the “baton” in the world in the fight against this social evil, as proof that the state not contribute to the spread of terrorism. In this case, the Saudi authorities express full willingness to cooperate to jihadists to counter in media propaganda. Riyadh has offered specific videos that are effective tools for the opposition propaganda the ideas of the radical Islamists. The Saudis have expressed readiness to send experts to work with satellite channels broadcasting from Europe and directly calling for participation in the jihad among the large Sunni communities in Europe. The EU representatives have turned their attention to the difficult fight against TV programs which are broadcast from the territory of third countries. At the same time, they reached agreement for the implementation of joint activities, including in this direction.

The particularly clear focus has been placed on the funding of the jihadist groups. The Europeans have proposed to create a “The Roadmap” which have measures to stop the financial flows to the mujahideen. Attention is paid to the need for the legislative initiatives, particularly on the regulation of the work of charitable foundations. The latter must clearly show that they fund terrorist entities. In this regard, it should be noted that in May 2014 was held a seminar with the participation of the European and the American security experts, who have identified concrete steps in this direction. The Europeans have expressed satisfaction that they had received the promise of the American colleagues for providing effective pressure on the institutions of the Gulf States in this regard.

However, it is noteworthy that the Gulf States hold their own judgment about the actions of the Europeans in the security and defense of the human rights. The risk of conflict between the criteria of the two countries remains too high and inconsistencies are not rare. An example is when in June 2014 at the request of the Saudi Arabia leaders of the Cooperation Council of the Gulf States (CCGS) have canceled a joint meeting with the EU at the ministerial level. The reason is that the Europeans have unreasonably interfered in the internal affairs of Bahrain, because of the human rights violations in the kingdom. In fact, underlying the differences between the two organizations stand a mismatches in the evaluation of specific political situations. The case in point to analysis of the events surrounding the Iranian nuclear program and priorities for dealing with the crisis in Iraq and the attitude towards the regime in Damascus. The CCGS leaders defend the view that the Europeans and the Americans are too “soft” to Iran’s nuclear ambitions and the government of Bashar al-Assad.

Very important and essential measure in the European counterterrorism efforts was the compilation of the “black lists” that facilitate the adoption of decision 1,267 of the Security Council of the United Nations. This figure needs to be compiled and the national “prohibitive lists” of persons and organizations participating in or facilitating terrorist activity in Iraq and Syria. The case in point about the freezing of their funds or the ban travel across the national territories. The general concept of the EU is that these lists must be protected and applied to as many partners.

Gilles de Kershyov offers two initiatives which have been studied and evaluated by a team of the High Representative for Foreign Affairs and Security Policy Catherine Ashton. The first suggestion is the “Consultative Group on Strategic links to Syria”. Its leading feature is to become a kind of the “Headquarters media war against the jihadists”, especially to those centers that recruit the jihadists-volunteers. The main target group will be specific the national Islamic community. The idea is to fend off efforts to send the local community members in Iraq and Syria in the ISIS and other the Islamist groups. The report recommends using to the British experience is the best in Europe in this respect. For this purpose, the EU officials have already carried out meetings with representatives of the companies “Google”, “Tweeter” and “Facebook” to ask for assistance in this regard.

The second major task is to mobilize humanitarian aid to victims in areas controlled by the jihadists in Iraq and Syria. The idea is that the Muslims in the Middle East feel the help of Europe and the international community not to support extremists. The activation to raise aid going to through the “Electronic portal of the EU”. In this connection it should be stepped up in various the civic and the volunteer organizations.

The EU representatives have made a number of meetings with their colleagues in the United States. All dispositions are consistent with them. The Americans said that they embrace the European mujahideen for much more dangerous to the security of the United States than their own mujahideen. This is due to the fact that the citizens of the majority of the Member States of the EU travel to the United States with the free visa. Moreover, the biggest “exporting countries” for the European muzhdahidini fall precisely in this list.

The territory of 15 Member States of the EU are already established the centers for the collection and analysis of data on all travelers to and from these countries. For this purpose are utilized and the bankroll. In this respect, the Turkey has declared that its prohibition list has about 5,000 Europeans as it is constantly updated.

The European experts have asked the Middle Eastern partners quickly and comprehensively to fill data to the Interpol for a persons who are suspected of being involved in the terrorist activity.

The EU cooperation with Lebanon is rated a lake the fruitful and the behavior of the authorities in Beirut as very productive. The Lebanese authorities want to help to build a special prison to the detain muzhdahidini to be the heavy duty. Furthermore, they want to be create a special military unit to monitor the borders of the state. The idea is to prevent the passage of the mujahideen in the national territory. The special emphasis is placed on the monitoring of the middle part of the Valley Bekaa, through which goes the international road Beirut-Damascus. Also requested the financial assistance and the professionals who to build the special lifts and the dispatch points for the electronic surveillance. In parallel, the authorities have requested assistance and the adoption of the specific legislative texts as they felt that the current law on combating terrorism is outdated. The Lebanese side is asked for the assistance in the training of judges and prosecutors dealing for this complex criminal matters.

The problem with Turkey remains the most difficult to resolve. The reason for this is not only a 900 km long border with Syria. The EU has asked to Ankara to create a single operating electronic portal as a focal point for the prosecution of foreigners who have participated in the jihad in Syria. The Turkish side has given its agreement in a principle to this proposal.

The great attention is paid to the financing of terrorism in the EU report. Then in August 2010 has created a special unit to deal with this matter. Until now has more than 5,000 investigations. Moreover, the focus of attention is to increase the efficiency of customs in each individual Member State of the EU. The report notes that some of the muzhdahidinite to try to bring in their own a country the prohibited items such as a weapons, an ammunition, an explosives and bankroll.

6. Conclusion

It is too early to say what will be the fate of ISIS and its caliphate. If no symptoms appear to strengthen internal discontent against the actions of extremists in the occupied territories, then in globally the jihadist movement in the Middle East, the jihadist movement marked the rise. The serious experts predict that hardly the pseudo state of Abu Bakr al-Baghdadi will be able to survive in the medium term. Not only the people, but until recently some the allies of the Idyll began to distinguish themselves from the extremists. To expulsion of the Christians

blowing up monuments of the historical and the cultural heritage of Iraq as the tomb of the prophet Yunus and several the medieval minarets apparently become the social implosion into an explosion of apparent intolerance of the terrorists. The caliphate in Iraq and Syria are a kind of a bubble, which has blown by the paralysis of the traditional country. The new forms of the natural and the contemporary formation of state are the real brake of a constantly flowing extremism in the region. What will be the practical dimensions? To some extent, the answer to this question were given by the events in Egypt. The patriarchy, the tribalism and the radically regionalism are the strongest to distinguish the Middle East even such the agrarian societies such as those in the Latin America (Hristov, 1999). If the political culture and the specifics of the process of political sociological in the Arab societies to channel dynamics of the restructuring of the state shaped the future leader and determine authoritarianism as its natural behavioral trait.

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Contemporary Philosophical Debate on Globalization

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Abstract

The article aims to present one typology of the numerous theories of globalization, based on the following criteria: (1) *genetic* (typologisation of position of “start” and the stages of the globalization process); (2) *convergent-divergent* (typologisation form of the perspective of understanding that globalization leads to homogenization or heterogenization of the worldwide achieved integrity); (3) *evaluation* (typologisation form of globalization’s assessment); (4) *philosophical and anthropological* (typologisation form of notions of anthropological consequences from globalization).

Keywords: globalization, theories of globalization, criteria of the globalization process.

1. The beginning of the globalization

If we summarize the different positions on the genesis and stages of the globalization process, they can be subdivided into three groups.

According to the first group, the beginning of a globalization is in ancient times. These authors believe that globalization processes begin when major empires are formed. At the heart of such visions is the notion that the history of mankind is accompanied by the two opposing processes – of universalisation and particularization. At different stages of the history, one of the two processes may prevail, with processes of universalisation occurring as separate communities outside their own borders. The process of universalisation is connected e.g. the expansion of the great empires through the Antiquity and the Middle Ages. The great empires have a highly universalistic and homogenizing role. The Roman Empire includes a huge number of territories and ethnicities, is a typical example of the forces of political and economic universalisation.

Typically, in the “forced” type of universalisation, which creates an “artificial” system, a set of different ethnicities, different languages and large, difficult to control territories, universalization is not lasting and is followed by fragmentation processes, the already established system (empire) is broken down in pieces and fragments. A major obstacle to the world's empires is the vast territory that can hardly be controlled. The political and economic universalisation evolves into cycles, and the state of transport and communication links during the given historical period is of great importance for the “durability” of the processes of the universalisation. Each of the cycles of universalisation has its technological base and its communications on which its durability depends, as well as its peculiarities. As we go back in history, the limitations of communications and the lack of a single market make the result of attempts at universalisation political and economic education less perishable, although they bear the signs of global trends.

Another group of researchers considered the time of the Great Geographic Discovery to begin the modern process of globalization. Jurgen Osterhamm and Niles Peterson (see in Osterhammel & Petersson, 2005) offer such a version of the roots of today's globalization, in which these roots are found in the colonial role of Europe. Representatives of this group believe that globalization is a process that is triggered by the expansion of Western civilization, which has imposed its values and institutions on the rest of the world.

The contemporary global world is such, thanks to the invasions of the European-rich countries in the past, in the isolated and unknown world of the other continents. But along with the Western expansion of the West, globalization is also linked to internal transformations of Western society itself. It is this interaction between external expansion and domestic economic, political and cultural changes that involves the existence of several stages in the unfolding of globalization. The Great Geographical Discoveries are the beginning of world trade, but also the capitalist relations that set the beginning of capitalism. We use the combination of economic and idealized globalization, because it is possible to realize the conceptual projects of its members precisely with the most elementary propulsion of economic processes in a social space. This period may be called the first stage of globalization, which has been going on until the middle of the nineteenth century. This is a period of migration of vast masses of masses, the mixing of religions and cultures, the expansion of transatlantic trade, and the imposition of some political and economic prospects over others. Capitalism is essentially universal in character. He seeks to embrace the whole world. The ideologies created by capitalism – the liberal and the Marxist – are the typical ideologies of the Enlightenment. They are based on the idea of universal history, according to which history represents a unified and inclusive process of mankind (as a critique of this idea, see Spengler in Popova, 2016: 11-37). The idea of the universality of history can be found, as has already been noted, in the Christian idea of world history: humanity has a common origin, that is the premise of its unity as well as of its common history. The development of capitalism is going through several cycles because the processes of universalisation are shifted from processes of partiality, the processes of liberalization are replaced by those of protectionism. It can be said that the main driving force is the process of universalisation, which is followed by processes of protectionism or “closure” within the state (that is exactly what we are talking about about cycles because the expansion of capitalism does not proceed “smoothly”, the process of development is not linear but rather disrupted).

In the different cycles there is a group of countries or state that are “hegemons” carrying the processes of universalisation. The second stage of economic and ideological globalization has been going on since 1840 to the First World War. This is the time when big economic agents spread their influence around the world. This is also the time of the Industrial Revolution in Europe and North America. World economic and trade exchanges have increased many times. Since the end of World War I most countries have been shutting themselves down, international trade has fallen into recession, capital is not moving. There is a rapid decline in the standard of living, high unemployment, and huge social problems that are partly caused by the Second World War. The third stage of economic-idealizing globalization takes the time from 1940 to the present day. The commencement of this stage was given on 14 August 1941, when Winston Churchill and Franklin Roosevelt signed the so-called Atlantic Charter for the Liberalization of World Trade. This process is marked by the application of liberal values and norms to an increasing part of the world, by the growing involvement of national economies by multinationals through trade, financial flows and direct investment. At this stage, there are also terms such as globalization, globalisation, globality. In American Banker magazine in 1978, the term globalism was first used. As Martin Olbrow (Olbrow, 2001: 9) points out, the use of the notion of globality is becoming an avalanche in the late 1980s and early 1990s of the twentieth century. M. Olbrow also recognizes the extensions to which the term globalism, globalization, globalisation, globality, etc., has been put forward, which signal the constitution of global processes and the creation of a kind

of globalist ideology. Globalization has begun to be considered as a marker for a profound social and cultural breakthrough.

The American researcher Immanuel Wallerstein 1978, the creator of the world-system theory, occupies a specific intermediate position between the first two positions of the beginning of a globalization. According to his theory the human history has taken place within three stages. The first is the stage of “mini-systems” that existed from the birth of mankind to the emergence of agrarian civilizations. This is the era of not big isolated structural units that were self-sufficient and with an inwardly unified culture. The second stage is the age of the “world empires”, which brings together the previous “mini-systems”. Integrating most often aggressively, related to wars and conquests. The third stage, the stage of the world economy, began in the 16th century. This is the time when the state is losing its general regulatory and protectionist role, giving it a priority place on the market. Because of its exceptional dynamism, capitalism is able to provide plenty of goods and become attractive to more and more people around the world. Began in Western Europe, he has a world over. But in this process there is a hierarchy of the world-like-system: the place of the empires is occupied by three different zones - central, peripheral and semi-peripheral. Whilst unified as a result of globalization, the world appears to be internally stratified, with different levels of development, wealth and potential for human development.

The third group of researchers as Roland Robertson, Ulrich Beck, Arjun Appadurai, Homer Baba, etc., believe that globalization is primarily a way of living in the world, a state of consciousness that has emerged since the 1950s. For these authors, it is important not only that the world becomes interconnected economically. What is decisive is that as a result of this process a kind of “global consciousness” is formed of individuals. In the course of the informatization of the world and the colossal acceleration of the means of transport, the space and the time of living fall into a state of “compression”, a transnational social space emerges, the fragmentation of the world disappears, and human consciousness acquires characteristics that never before existed – “Globalize” itself. In the opinion of these authors, the globalization of consciousness began to appear in the middle of the last century. That’s why the globalization process may have started in its economic dimension earlier, but in the true sense of the word it has only begun since the 1950s.

2. The globalization – Homogenization or heterogeneous

The theories of globalization as authors’ perspectives have developed over time. That is why we can talk about various “generations” (R. Robertson’s term – see in Robertson, 2004: 63) in the debate. Among the theorists of globalization we can conditionally distinguish “first” and “second” generation. In the very “first” generation, they can be divided into “homogenists” and “heterogens”. The first is trying to build a vision for a world system. Assuming that universal is always present in the particle, they implicitly refer to a possible variant of convergent development. The latter question the existence of any system in the world. They deny the division of the universe and the particle, taking into account the dominant role of the West over the “rest of the world”, as a domination of one particularity over others. They dispute the convergence principle and, in general, the very notion of development. Heterogens can be called “postmodernists”. If we assume that globality is the state of divergent (in the sense of smooth, distant, progressive) modernization of the world, then universalism is the state of growing particularity.

Anthony Giddens is a typical representative of the so-called “first generation” globalists – homogenists. In order to highlight the differences in positions with the globalist – heterogeneous theorists, we will compare its basic theoretical concepts with that of Roland Robertson, which we could refer to the “heterogeneous”.

A. Giddens is one of the first to start talking about globalization and globalization as a variety of changes, not simply a single change. This thesis after it has been repeated many times in a variety of modifications. For him, globalization is a new stage in the modernization associated with the beginning of New Age. The globalization involves the division of space and time, the intersection of presence and absence over broad sections of them. For A. Giddens, the globalization is a comprehensive and inclusive change in societies, moreover, it is a catalyst for the processes of changing societies themselves. Today, people are less concerned about the traditions, enjoy the expanding living world, and in their everyday life they have access to consumables of all kinds, opportunities for social construction and regulation of the societies they create and live in. As a result, the individual becomes more independent.

For R. Robertson, globalization is “shrinking”, “collecting” or even “compressing” the world as a whole. Events or actions at any point on the planet affect or are a condition of social interactions at another point, too distant and at first sight nothing to do with the first. In this sense space is beginning to lose meaning, the world is “thickening”, it becomes “one”. R. Robertson views globalization as a two-person process. On the one hand, globalization leads to global institutionalization of the human life. People socialize and organize their lives not only, not even under the influence of the immediate social environment around them, but under the direct impact of world macrostructures.

Situated under the influence of global information flows, the expansion of Western goods, international institutions, etc., modern man lives both in his locality and in the “big world” – his life is both local and global. At the same time, R. Robertson emphasizes the other face of globalization, which he describes as “the localization of globality”. In his particular and individual life, modern man lives among representatives of various local cultures. Everyday life turns out to be a routine of interactions, involving elements from different cultures, from different social worlds. Thus, the process of “shrinking” the world is a process of connecting individual localities. In this context, R. Robertson reconsidered the notions of locality and globality. Locality itself is a product of globality. But it is true, and vice versa, globality is a network of local events. Much of today's global mass culture is in fact marked and wearing ideas, styles and genres that affect the religion, music and art of local nationalities. That is why R. Robertson proposes the concept of gloom as more adequate in his ability to describe the processes of the reciprocal integration of the local into the global one. He is even inclined to replace the use of the term globalization with the notion of glocalization. The glocalization reconciles the excessive tension that is being generated by analyzing globalization and local processes. The term very clearly expresses the inextricability between the global and the local and, at the same time, the incompetence of “global phenomena” to their “placement” in one or the other national state. Through the concept of the “glocalization”, R. Robertson tries not to treat global as something that is ready and “top”. In its conception, the global is the result of the collision and interaction between the localized elements of the local elements coming from or received from different localities.

R. Robertson is an expression of moderate “heterogens” with his concept of the “glocalization”. The position of the ultimate heterogeneous is expressed in the concept of Jan Nederveen Peters (Peters, 2004), according to which globalization produces hybridization. According to Jan Peters, globalization is a process of hybridization, the production of a global mix of elements coming from different directions of the world. What are the arguments of Jan Peters to make this conclusion? Jan Peters believes that the concept of A. Giddens, according to which globalization is the natural and immanent continuation of modernization, is too dogmatic. He assesses it as a variant of the Marxist thesis on the spread of the world market. In A. Giddens's theory, modernization is universalized, that is, transported from the West, where it is her “homeland” to the other ends of the planet. According to Jan Peters, this is a false thesis, because modernization is a stage that is historically evolving. For Jan Peters, globalization is a hybridization in which forms are detached from existing practices and combined with new forms

in new practices. For him, globalization does not at first include either universalisation or multiculturalism, but rather interculturality. With the notion of cultural hybrid, Jan Peters means blending different cultures: European, Asian, African, and so on. In this way, global culture is formed as a global mix of cultures. Peters gives the following example: "... the Catholic saints can be regarded as icons of Christianity but also as receptacles of pre-Christian paganism entered into the Christian canon. In this light, their use as masks of non-Christian gods is not so strange and rather reminiscent of the transcultural resemblance of paganism" (see in Peters, 2004). Jan Peters offers a cultural analysis of globalization to the point that hybridization is related not only to "culture (cultures)", but also to biotechnology, virtual reality, electronic simulation, etc. Through hybridization intercultural differences can begin to fade and become relatively insignificant.

Differences between are called "Homogenists" and so on. "Heterogeneous" turn out to be ultimately derived from which aspect of the globalization process is prioritized. When the economic dimension is highlighted, the homogenization of the world comes to the fore. When globalization is viewed in a broader sense – as a unity of economic, information, cultural processes – then the emphasis on its internal diversity is reinforced. The idea of being seen as imposing the same model on different societies is instead treated as a unity of the local and global, i.e. as a process of heterogeneous/"glocalization", "hybridization", etc.).

3. Value typology of the theories of globalization

The theoreticians of the globalization differ among themselves not only from the point of view of the genesis of globalization, but also from the point of view of its evaluation. Against this criterion, the different concepts can be summed up into three groups, which we can conventionally refer to as "apologists", "anti-globalizers" and "neutrals". The differences between them are differences in the assessment of the effects on public and human development stemming from the globalization process. There is also differentiation in terms of whether or not the possibility of regulating or even stopping the globalization process is accepted or rejected. According to the apologists, it is neither necessary nor possible to stop this process. "Antiglobalists" think the opposite. Neutrals are trying not to take a definitive and unequivocal stance in this debate. They regard globalization as a multilateral flow, involving relatively independent processes, the consequences of which can be assessed differently.

The apologists of the globalization assume that it is not only an objective, spontaneous and unavoidable process but also a process that brings good to all. By interpreting globalization as "spontaneously emerging in the market, acting through the continuous development of the international division of labor, eliminating the limitations on individual freedom and integrating individuals more and more closely", Ivan Varbanov believes that "the globalization is a process that pushes people towards voluntary unification and world peace" (Varbanov, 2010: 9). According to the same author, the negative effects of globalization are the result of abuses and attempts to regulate it. Ivan Varbanov believes that globalization is such a massive and complex process that: "It does not lend itself to the conscious control and planning of even the most powerful and democratic international, if not national, institutions. Whatever is desired, global governance by enlightened, honest, fair, compassionate international and national organizations is an utopian unthinkable" (Varbanov, 2010: 13). In his view, such attempts to intervene in managing the process of globalization are, in fact, utopian and dangerous attempts at social engineering and the manifestation of constructivist rationality of the Cartesian type.

The anti-globalists occupy a pole opposite. For them, globalization is a degrading process. We can divide the anti-globalization in both directions: left and right. But this division is conditional because the ideas of these currents often intersect, as also because in the so-called left-hand anti-globalization there are practically incompatible ideas shared by different groups and

organizations. Charles Meyer rightly notes that it is strange to speak of left and right anti-globalization because globalization is per se – neither left nor right (see in Meier, 1997).

The term “anti-globalization” has been imposed by corporate media since the protests in Seattle in 1999. Richard Saage argues that recently, criticism of globalization is so numerous that it leaves the impression that she has no advocates at all. However, the same author is of the opinion that globalization as we know it is without an alternative, and its purpose is to realize the capitalist utopia, which will be the last utopia.

We can find the left anti-globalizationists among the advocates of the left-liberal, social-democratic, extreme-left and pseudo-anarchist models of public organization and governance of the world as a whole. Ideologically, they offer two options to solve the problems that accompany globalization: (a) By means of protectionist barriers and other state control mechanisms, to reduce or even completely reduce the detrimental effects and effects of risky operations in transnational business, international competition, international financial capital, etc.; and (b) Actual functioning of the international institutions set up to strictly monitor and control globalization. The anti-globalists believe that only this way can the global neo-imperial capitalism, which is mitigated and socially oriented, can be prevented. Left-handed anti-globalization movements are Human Rights Watch, the Socialist Workers Party, the world forum in Porto Alegre and others. These movements seek to something that we can call “capitalism with a human face”. Their propensity for nationalism is obvious. In addition to these movements, left-wing anti-globalization is embodied in other organizations and movements that deny not only globalization but also the social model of capitalism and the state in all its manifestations, regardless of whether it adopts protectionist, statist or neoliberal models of government. To them belong most groups of anarchists, radical ecological and liberal-communist groups. Anarchists are not against globalization in its entirety. On the contrary, they take advantage of it in the area of free movement in space and expression of opinion, but are against the corporate globalization of capitalism. Anarchist models defend the principles of direct democracy and direct action and refuse any representation through the model of parliamentary democracy.

A powerful anti-globalization motif appears when a nation-wide crisis occurs as a result of mass immigration waves. American researcher Pat Buchanan justifies his critical theory of globalization, analyzing the demographic situation and trends in the United States. According to him, the American society, which has traditionally been perceived as a typical example of a global multicultural nation, is about to show that it is not such that in it, like in all other societies around the world, there is a process of fragmentation, and it is impossible determine at what point the cultural and racial differences that have always existed will begin to transform into social anarchy. This, he said, will be the case for more severe economic shocks or even recessions or the first major waves of immigrants from Africa, South America or the Middle East. “Among the most serious problems America has to deal with is the huge Third World human wave”. Current immigrants crossing borders do not intend to change their identity – on the contrary, they try to impose their culture and mentality in the neighborhoods where they settle. This is also a reason to think about a possible withdrawal from the processes of globalization and the formation of something like translocalism (see in Buchanan, 2006). Another reason for anti-globalization is that globalization is accompanied by increased conditions for organized cross-border crime and an increasing sense of insecurity. Hence the desire for more protectionism, for more national “enclosures”. German researcher Claus Leggewie (2007: 64) writes on this occasion: “The national protectionism, which neither raises borders nor builds customs, spreads through a widespread sense of insecurity and nervousness: even America, an exemplary and transnational imperial republic, after 11 September regresses to classical national state; so-called anti-terrorist packages allow for more serious border and visa controls, which even stops the entry of emergency doctor-requiring doctoral students. Stopping ‘potential’ terrorists can harm mobility and the world-wide communication and thus remove the decisive preconditions for the fall of the world’s borders”. In

other words, by generating growing fears and thirst in the strong hand of the state, globalization actually generates anti-globalization sentiment.

Many extreme nationalist, fundamentalist and even fascist movements can be included in the right anti-globalization. Here is what the Italian philosopher Antonio Negri writes on this question: “Fundamentalism should be understood not only by radical Islam. Here are different versions of Christian fundamentalism in the United States, nationalistic trends in Europe, similar to the French National Front, groups of the type of the Russian ultra-right and the Orthodox Church. The common in all these movements is one: proclaiming the values of traditional religions, nations, races, or all together, asserting purity, closeness, and proclaiming these purposes sacred and unchangeable”. Fundamentalism opposes its values against the values of global capital and postmodernism, including racial or ethno-cultural diversity. In the field of economics, domestic and foreign affairs, social policy, they usually support protectionism and conservatism, including variants – e.g. the idea of an Islamic trading community for some fundamentalists. Especially, fundamentalism is opposed to the free movement of labor as an indivisible feature of free trade. Fundamentalist currents also oppose the free movement of capital, information and production capacities. This creates a halo of defenders on the national markets, labor, and therefore enjoys a great influence in the proletarian quarters and regions.

One of the most prominent representatives of anti-globalization in philosophical circles are Antonio Negri and Michael Hardt. In their works they justify the fact that the imperialist phase of national capitalist states has come to an end and has been replaced by the so-called “Empire”. It dominates the whole world without a separate geographic power center, and in its insatiable expansion has already absorbed all nations. This perfect empire in its totalitarianism does not allow the appearance of any “external” critical views, since it controls everybody and everything. With the term “Empire” these two well-known authors understand a globally bound economic, information and political system that rules everything without specific boundaries and a distinct center. In contrast to the national imperialism of the individual countries of the past, which have always had their own external borders, the global capitalist empire has no way to expand, because it has the power. The “Empire” is a globally interoperable network structure consisting of supranational institutions such as the International Monetary Fund, the World Bank, the World Trade Organization, etc., by giant private media companies, and by so it is capable of encompassing the whole world and preserving its power by influencing people's consciousness and thoughts, and thus the “Empire” imposes control over them and suppresses their social dissatisfaction still in the fetus. And when it becomes necessary, Empire also applies a “hard force” through state administration, police, and even the army, and Hardy and Negri call this kind of overwhelming dominance – Biopower, but this totally controlling structure is not invulnerable, optimistically referred to by the authors of “Empire”. Since all the organizations and power structures of this global system have been transformed from hierarchical structures into decentralized networks, their separate links can be torn apart, and in this sense “Empire” the next book, “Multitude,” do not represent works that view the system of global capitalism as a doomed system. Even today, the “majority” of the masses have a chance to change the course of history, and the authors believe that the hope of change arises in areas of insecure working conditions as well as in new high-tech industries and services where intellectual knowledge and skills: M. Hardt and Anne Negri broaden the concept of working people on all employed and call them the “new proletarian” (see in Negri & Hardt, 2004).

The antiglobalization has a particularly recent manifestation in the recent “criticism of the streets”, which has inherited momentum in the United States and Europe from the coming waves of economic recession, Euroscepticism and anti-Americanism in the period from 2009 to 2012. This street critique has been given the unspecified “The Outraged”. Political analysts of this political-social phenomenon placed it on the left-hand scale of anti-globalization, while others interpreted it as the “centerless center”. The anti-globalization of the “Indignants” has “fuzzy”

arguments, vague goals, and lack of alternative solutions to tackle the drama of the apparent economic and political crises prevailing in liberal-democratic societies. Rebellion's rebellion is rather an expression of unconscious anarchist anger over the "collapsing", the familiar and orderly socio-political order in the "rich West" societies, rather than a rebellion to the ever-spreading and unhurried consumer spirit in our societies. Thus, on 15 October 2011, people around the world united against the power of banks in an effort to "put an end to the power of banks and corporations". This demanded hundreds of thousands of demonstrators around the world with their protests. Protests of the "Indignants" on that date covered 720 cities in over 70 countries around the world (see in Torrent, 20011), which suggests that we are witnessing the emergence of a new global public opinion - no center, no spokesperson and no on the occasion of these events, Ivaylo Dichev writes: "It is the same discontent, though manifested in very different contexts: Political power all over the world is beginning to be outraged – in the Arab world, there are decades of dictators who have gradually turned in its policy of management development, social benefits, and equality to ordinary Eastern despotism In America, dissatisfaction comes from the neo-liberal course taken over by Reagan to benefit the rich, deindustrialize the economy and stretch of social scissors. In Europe, increasingly neoliberals talk about it, that the social state, the result of the post-war compromise between labor and capital, has spent its time, what is the profile of the protesters? These are people who are opposed to any policy - they refuse to have a leader, a program or even some minimal vision for the future. The Spanish 'outraged' is a good illustration – the emotion of indignation is a substitute for a rational political analysis, more equity, lower taxes, human rights and immigration, and security, freedom, freedom ..." (see in Dichev, 2012).

The antiglobalization does not solve the problems of globalization, nor is it able to stop it. But its existence makes sense if "criticism" produces more prudence and sobriety in political classes. Because citizens suffer not only from the possible negative effects of globalization but also from its misuse. Against this background, Amartya Sen's words: "Doubts against globalization will drop out when the world is globalizing. The demonstrations themselves against globalization are part of a global process that has no escape, whatever motives to look for. But to support this process in its goodies, politicians and institutions have to convince us that they are acting properly. Otherwise, the doubts will remain" (see in Sen, 2002).

Along with these two positions – a completely uncritical and totally critical interpretation of globalization – there is also a third position that does not focus on the final aspects of global processes. We can conditionally call it a "neutral" position. It can best be expressed in the assessment of the British social thinker Martin Olbrow (see in Olбrow 2001), according to which such a position "offers neither comfort nor apocalypse" in interpreting and evaluating the processes by which the era of modernity is transformed in the age of globality, according to M. Olbrow, modernity dominates our thinking to such an extent that the detachment from it proves to be extremely difficult, but in the present day there is a historical transition, a change of epochs, so we must learn to get rid of the tradition The modern age is stimulated by the desire to impose human control over nature, the economy, and the human race itself. The basic social construction that the "modern age" carries is the national state, but the expansion of the national state ultimately faces the limitation of global resources, while the expansion of rationality increases the complexity of the action. And the expansion of force means reduces the rationality of the world from the point of view of the individual and increases the sense of risks and insecurity. The opportunities for crises in industrial societies are getting ever more profound.

The national societies are placed at two main problems that pose difficulties for the theories of national societies: the first problem is for borders; the second problem concerns units of analysis. All this suggests that the epoch of modernity is exhausted. Against this backdrop, the challenge of understanding the historical breakthrough – life beyond modernity, stands out. M. Olbrow describes the shifting of modernity to globality as follows: "There can be listed at least five basic ways through which globality has already pushed us beyond the assumptions of modernity.

These include: the global environmental consequences of aggregate human actions; the loss of security in a situation where the weapon is characterized by global destruction; the globality of communication systems; the emergence of the global economy; the reflexivity of globalization, in which people and groups of all kinds view the globe as a framework for the sacrifice of their beliefs” (Олбров, 2001: 14). The British social thinker emphasizes that the exhaustiveness or end of the modern age cannot stop or stop a development whose roots are far back in the past and in the field of different cultures. The advent of the global age simply deprives modernity of its defining function within the modern era. What is characteristic of the “global age” is the scope of life of the modern individual. The impacts of an individual's individual environment, wherever they are in the world today, can be linked to the functioning of processes that are world-wide in their reach. M. Olbrow concludes that globalization is a process that “cannot be diverted by simply rejecting it as another narrative”. Globality involves a new kind of interconnection where events can have concurrent effects anywhere in the world where a message can be answered immediately and the answer is immediate, regardless of the distance where products and services are the result of a global division of labor. By listing the main manifestations of the global age, M. Olbrow points to the transition from transnational to global institutions, the denationalization of the economy, the emergence of global social movements, the relativisation of human identity, the emergence of new inequalities and new stratification, etc.

In each of these events, M. Olbrow sees both chances and threats, difficulties, challenges for society and for man. That is why globalization cannot be said either as a “comfort” or as an “apocalypse”. The position of “neutrals” has yet another manifestation – the protection of regionalism as a mediator between the limitations of the nation state and the difficult challenges of globality. The regionalism is an expression of a historical need to coordinate the actions and the development of a larger number of countries for the achievement of certain goals. And immediate goals are primarily in the economic sphere but inevitably involve political, cultural, environmental and other goals. On the other hand, regionalism is more attractively attuned to its greater realism and reach than globalization. In fact, regionalism is a form of manifestation of globalization, but in geographically limited regions. We could distinguish between two types of regionalism. One is formed and determined on the basis of historical, natural and geographic features and is recognized and recognized as such by the specifics of its culture. The second type of regionalism, whose perimeter expands and encompasses different countries, is in view of the need to solve common problems. This type of regionalism builds on the orientation towards the achievement of universal values: openness to others, gradual abolition of national borders; respect for human rights, regardless of its ethnic, religious or national affiliation, solidarity in solving large-scale social, environmental, economic problems, etc. The theorists advocating a neutral approach to globalization point out that regional unions are able to minimize the distortions and negative effects of the objective move of globalization by using the power of the united supranational social. United States-based countries generate systemic interest, which in most cases opposes the expansion of the global hegemony in the globalization process.

The defenders of the regionalism point to another positive effect of its implementation. The decline in the political participation of individuals at national level, combining with values of modern man defined outside of national politics, leaves the old political communities of the national state in a state of legitimate deficit. National politicians strive to compensate for this deficit by intensifying the symbolic attractiveness of national identity or by highlighting national forms of control over legitimate violence. As a result, the dangers of aggressive nationalism are rising. Regionalism as a form of integration of many national nations is an appropriate response to the threat of aggressive nationalism. The global scale is too large for the ordinary person to feel comfortable, and the scale of the nation state too small to solve the problems and challenges of modern man. In the middle there is the space of the regional unification.

4. About the anthropological implications of globalization

What are the consequences of globalization for the conditions of human existence? The vast literature on globalization has given different answers to this question. Here we will briefly address three of the many versions to answer this cardinal, a key issue for our topic. One belongs to A. Giddens, the other to Arjuna Apudare, and the third to Z. Bowman. Their choice is dictated by the fact that these authors are to some extent the “normalizing” authors in the contemporary anthropological discourse on globalization. A. Giddens focuses on globalization as a factor that causes de-traditionalization of human identity. A. Apudare develops the theory of “imaginary worlds” in whose center is the de-territorialized man. Z. Bowman, in turn, emphasizes the changes in attitude towards the Other and the need for morality without the existence of a moral consensus. Of course, the theories of these social thinkers are not limited to these topics and their respective decisions. But for the purposes of the book, we can afford to reduce them in this way.

A. Giddens defends the thesis (see in Giddens, 2001) that globalization questions the importance of tradition in the formation of human identity. The man in these conditions of globalization has a very mobile life. His mobility is predetermined by the fact that he has to periodically change professions, travel and communicate with strangers, “anonymous” people, encounter an environment whose historical and cultural roots are completely alien to him, to be daily piled up by media with information streams, reflecting the world without regard to distances, to stay daily in the virtual world of the Internet, and so on. In this way, globalization multiplies the individual's social ties, but also makes them more anonymous and transient.

All this provokes the de-traditionalisation of the life of the globalized man – he is less and less affiliated with his own ethnicity, with his nation. Traditions, that is, well-known and time-tested values, norms and moral categories cease to act as traditions. Globalized society is a post-modern society. In such a situation, man becomes freer – he can choose the “screen” of all sorts of traditions, but at the same time weaker from the belief in the past. Traditions, which have been a fundamental element in regulating an individual in a pre-globalized society, can no longer prevent either contact with other traditions or alternative forms of life. The “other” as such can no longer be ignored, just as someone who has no influence on our own lives. Thus, a cosmopolitan perspective is revealed, but A. Giddens does not consider it to be a problem. For A. Giddens, the conflict in public and conceptual terms is between the cosmopolitan perspective and fundamentalism. The latter, according to the author, is a new phenomenon (despite the widespread view that fundamentalism has always existed) and is a reaction to globalization. It is not part of any religious or other belief, but is related to the question: how is the claim to the truth of a belief protected, and how does it stand out? It's not about what people believe, but why they believe and justify their beliefs. Fundamentalism, according to A. Giddens, is a “encapsulated tradition” – a tradition “traditionally protected by reference to its ritual truth”. Fundamentalism returns the guardians of tradition as the only interpreters of truth and gives them new power. It does not represent a resistance to traditional cultures against Westernization (which are the most common interpretations), and a food environment to preserve tradition “in a traditional way”. Fundamentalism does not take into account ambivalences, multi-faceted interpretations, complex identities. This, according to the author, leads to the rejection of dialogue in an increasingly globalizing world whose peace and continuity are based on dialogue.

The fundamentalism is dangerous because it does not exclude violence as a means of achieving its goals and rejects cosmopolitan values. However, it raises many questions about global modernity. One of the most important is the question of values: “Can we live in a ‘world’ in which nothing is ‘holy’ in a world without any values?” For A. Giddens, the answer is negative: “None of us would have something for which it is worth living if there was nothing worthwhile to die for” (Giddens, 1996: 316). However, the values to be defended in a global world are those that have universal nature and validity. For A. Giddens, this is tolerance and dialogue. It is precisely

tolerance and dialogue that would counter the opportunities and dangers of the forms of fundamentalism. According to A. Giddens, tradition can continue to exist and even flourish in the post-renaissance order. However, this would be possible if it defends itself discursively, if it justifies its values in competition with many other values. This may lead to a multilayer reflexivity, in cases where religion protects with the argument of how difficult it is to live with a radical doubt. Discursive protection of tradition does not necessarily even put the unchanging truth into question, but it must take into account the consequences of this. The only requirement, according to A. Giddens, is the readiness to engage in dialogue and to exclude violence. Otherwise, tradition becomes a fundamentalist one that affirms an immutable truth without regard to the consequences. Not the belief in unchanging truth, and the readiness for violence “in the name of the truth” becomes a hallmark of fundamentalism in our post-modern world. With the sunset of tradition and the development of individualization, the attitude of people towards themselves, as well as the building and functioning of the institutional structure of modern societies, is changing. A. Giddens notes this process of transformation as a direct dependence and the fruit of emancipation from tradition. A. He sees the consequences of these changes in the following way. On the one hand, identity is no longer predetermined, but chosen, the individual must build and maintain his/her freedom. But on the other hand there are radical changes in the mechanisms of trust without which human life is like a boat without anchor. In the modern world, trust becomes a problematic reality. The traditional scheme of previous societies “trust = personal qualities”, besides being under-questioned about the functioning of modern day life, man has to “trust” many abstract systems, the monetary system to work with the absent, the anonymity of man in this vast global entity. A. Giddens calls this kind of new process of trust to give rise to a tangled trust that creates a new “self-indebtedness without purpose”. “Strong Trust” blocks and even eliminates the committed clash with abstract systems that define the content of everyday life.

Another version of the thesis that globalization affects people by breaking it from its traditions is being developed by A. Apadouray. In an anthropological perspective, he views globalization as a process of de-territorialisation of man and the introduction of human life into imaginary worlds. By virtue of globalization, modern man loses his social attachment to the particular physical space, to the local territory. The immediate personal environment of a person becomes different from the local community in which he lives. M. Olbrow, who develops this thesis by A. Apadoura, gives the following example as her view: “For the scholar, access to the Library of the American Congress can guarantee him the immediate personal environment, even if he lives in Toronto. For the London Dealer, the familiar contact via e-mail with his partner in Hong Kong is just as important for arranging everyday events. ... The immediate personal environment is therefore different from the local territory” (Олбров, 2001: 244). The local, this traditional place of habitation is treated by A. Apadouray as as much as a deteriorized as the global one. It turns out to be an “imaginary world”, as imaginative as the global one. Local and global are “things” that are not separated from actual distances, but from the degree of intensity of imagination. Local and global are treated in the theory of A. Apidarai as the two sides of a process – the process of globalization.

Z. Baumann warns of the serious change and the monstrous alienation in interpersonal relations under the influence of life in a globalizing society. It is interpersonal relationships that actually build societies, and when these relationships are not built properly, there is a shortage of “humanity”. In his book *Life in fragments*, H. Bowman unfolds his thesis that “ownership has many forms”. By illustrating this thesis, he writes: “There is mobile co-operation – on a busy street or in a department store. Place of passage of immediate proximity and sudden division. The mobile place with fluid content; with the movement of that place the silhouettes enter (or are sucked in) and come out or are thrown out of it – some silhouettes are seemingly self-propelled; others are put in motion only by the movement of the mobile space itself. Only some silhouettes succeed in becoming strangers – in beings with intentions, beings whose intentions matter” (Bauman, 2000: 63). Further, Bowman sketches other forms of cohesion in

today's globalized society – the stationary coupling of the train, the airplane, the receptionist, “the gathering together of strangers who know that they will soon leave each other on their way”; the measured association in an administrative building; “manifested cohabitation” (soccer crowd or disco, etc.). By characterizing and distinguishing these forms of sociality, Z. Bowman still finds something unifying in them, summarizing them – they are above all instrumental occasional occupations. They are “side by side”, to some extent be “be with”, but they do not usually have the most personal form of “being for”. These forms of association are episodic, with no history or no future, no “lasting inheritance of mutual rights and/or obligations behind them”. In another metaphysical ethic space, H. Bowman puts it in a “to be for”: it is a “leap from isolation to unity, not to blending ... but to an alloy whose invaluable qualities depend entirely on the preservation of diversity and the identity of its ingredients” (Bauman, 2000: 70-72). In the conditions of globalization, the instrumental forms of co-ownership prevail – the person lives among foreigners in the direct and transient sense of this word. That is why the forms of alienation are growing.

In this context, Z. Bowman defends the thesis that life in a global world requires us to “caring for the Other” (Bauman, 2000: 203), based on and in its otherness, self-esteem and self-identity. This could create the path to a new socialism. H. Bowman speaks of the fact that the moral choice must be made in the person of, for and by the other. Our morality as people is in our incessant question as to whether the choice we make towards the Other is good or bad. Good choice not only for me, but just the opposite – first of all for and against the Other because we can never know if my actions are positive or negative to it in full, nor how a positive choice today will be projected into tomorrow and in what direction. According to Bowman, a moral personality can be recognized by the fact that she is never satisfied with her moral behavior, she knows she can still and require more of herself. The more responsibility he assumes, the greater the possibilities for guilty behavior, hence the ambivalence of the possible consequences. This ambivalence, ambiguity, and the imperfect principles of self-criticism cannot be eliminated or corrected by learning rules or norms, or using advice, but only by the very unconditional conditions of our lives. Z. Bowman calls this the “soil” in which it has rooted and in which the moral person grows. This growth and its fate in this place where it is topped up, but not in the real life scale, as a social presence in the world, but in the mental plane, as a moral level. To such a type of moral personality he puts his hopes. This metaphysics of the morality that meets us face to face and implies our possible future actions in reality, first at this intersubjective level, makes us responsible for our actions in the real life world. The guarantee of the individual's moral presence in the global life world is the individual, and the attitude towards the Other is the guarantee that the world will be ordered. In this way, Z. Bowman expressed not only his anxiety that a globalized world as a world among strangers is possible to become a world without moral consensus, but also the hope that a new moral is possible – possible, though very risky.

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Deficiency of Prognostic Competence in Younger School Students With Persistent Learning Difficulties

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Abstract

The problem of anticipation occupies an important place in psychological research. Through anticipation, a school student is able to control the learning activity; the mental processes acquire qualitative changes associated with the function of consciousness. In terms of forecasting development, the younger school age has a special place. Social responsibility, widening the circle and complicating the content of meaningful relationships with people raises the requirements for anticipating the consequences of their own actions and actions of younger school students. The aim of the research is to study experimentally the prognostic competence of junior school students with persistent difficulties in learning and identifying the specifics of their forecasting in important spheres of life for a child.

Materials and Methods: As a diagnostic tool, the author's method "Ability to forecast in the situations of potential or real violation of social norms" was used. The study involved 80 primary 8-10 year old school students studying in the Republic of Tatarstan and the Republic of Mordovia.

Results: It revealed deficiency of cognitive and speech-communicative spheres of prognostic competence of junior school students with persistent difficulties in learning; the lack of forecasting in the field of learning, which includes educational cooperation and educational communication of the child; the predominance of the pessimistic attitude and generalization of the forecast, passive position of school students in the forecast future situations.

Discussion and conclusion: The data obtained in the study does not contradict the results of earlier studies, confirming that for schoolchildren with learning difficulties it is harder to predict the development of events in educational activities, and on the contrary, they were more successful in predicting relations with peers. Children with persistent learning difficulties find it more difficult to recognize the emotions of participants in the events, the forecast is more passive and pessimistic. The features of prognostic competence revealed in the study make it possible to form individual programs for the development of the prognostic abilities of schoolchildren with persistent learning difficulties.

Keywords: junior school student, learning difficulties, forecasting competence, functions of forecasting competence, criteria of forecasting competence, areas of forecasting competence, lack of forecasting.

1. Introduction

The importance of forecasting issues for psychology reflects the age frame in which the study of anticipation processes takes place (Nichiporenko, 2006). Various aspects of forecasting are studied in early ontogeny (Sergienko, 1997), at the younger school age (Akhmetzyanova, Artemyeva & Tvardovskaya, 2017), in adolescence (Ulanova, 2015), in senior school students (Karpov) and students (Akhmetzyanova, 2016; Artemyeva, 2017).

The contribution of Soviet/Russian science to the development of the phenomenon of anticipation was studied by Nadin (2015). Regulation of behavior by Regush (2003) cannot be carried out without constructing a model of the future, or in other words, an acceptor of the action results, which makes it possible to compare the obtained results of the subject action with the social norms of a certain group. This aspect of regulation is provided by the processes of anticipation (forecasting), which acts as a component of perception. The plan for constructing a holistic perception of objects determines the knowledge of the environment and the identification of social risks for forecasting events. In her research, Akhmetzyanova (2017) revealed that due to anticipation (forecasting) the junior school student is able to control educational activity; the act of communication is accompanied by the forecasting of one's own behavior and actions of others. Sheeran et al. (2014) identified the elements of risk, such as risk assessment, perception, anticipatory and prospective emotions associated with changes in the intentions of people and their behavior. Forecasting with an incomplete set of factors was studied by Gusev and Okunev (2017). The consequences of early processing of social anxiety on the cognitive symptoms are reflected in the study by Mills et al. (2014).

In modern psychological studies, junior school age is regarded as a stage of special significance (Gavrilyuk, 2006). On the one hand, it is extremely important for the subsequent development on the eve of the adolescent crisis; on the other, the increased demands of today's society for the position of a school student reveal the drawbacks and deviations that are the result of development in preschool childhood (Matveeva, 2010). The increased interest of modern psychology to anticipation is determined by a variety of functions it performs in various spheres of life at different age stages. The younger school age has a special place in terms of the forecasting development. In the educational activity, there is a process of accumulation and systematization of knowledge, such neogenesis as self-analysis, internal plan of actions is formed.

In educational activity, there occur the most significant transformations of mental, primarily cognitive, processes of the child, as well as changes in the content and ways of interaction with others – the basis of personal development (Vlasova, 2016). The most important social institution in the younger school age is, along with the family, school; relations with school are the main form of the child's relationship with society (Skvortsova, 2015). The social status of the school student determines the most important spheres of the child's relationship. The teacher becomes a leading figure in the life world of the junior school student; he acts as the main representative of society, the bearer of social and cultural norms (Bayanova et al., 2016; Artemieva, 2016). The attitude of the teacher mediates the attitude toward learning, the relationship with peers within the school and to a certain extent outside its walls. Academic success of a junior school student, including assessment of his achievements by a teacher, becomes an important factor in the child's family situation.

Theoretical analysis of the sources on the problem of forecasting (Nichiporenko, 2006; Akhmetzyanova, 2016), empirical studies (Akhmetzyanova, 2016, 2017) allows us to assert that prognostic competence of a junior school student consists of the ability to forecast in learning, in relations with the teacher, with peers, in relations in family, with adults, in relations realized in the Internet space, as well as in the attitude to their own health. Each of these areas of relations places special demands on anticipating the future, forecasting the consequences of their own

behavior and actions of other people (Denisova, 2012), and also provides special conditions for the implementation and formation of prognostic abilities.

Family relations, which change in connection with the child's new social status of a school student, continue to be a significant sphere of socialization for a younger school student. Relations with adults are not limited to relations with teachers and adult family members; expanding social contacts in the circle of communication include other adults, the interaction with whom is still less controlled by the parents of the student. As a separate sphere of socialization of a modern child, we consider relations in the Internet space; this issue is the realization of the understanding of childhood as a specific historical category. For today's junior school student, information technologies, which are the source of serious threats, present great opportunities for development. The considerable time that children spend on computers and smartphones requires considering computer games and relationships in social networks as a separate sphere of the junior school student (Akhmetzyanova, 2017).

2. Problem statement

At present, the study of prognostic competence in children of primary school age presents not only the research task, but also a social mission of scientists to model success of socialization processes, to prevent the initial process of the deviant behavior formation in primary school age children.

3. Research questions

We assume that junior school students with persistent difficulties in learning and mastering the academic programme will have deficiency of prognostic competence, especially in the field of educational activities. Probably, the cognitive function of prognostic competence will not be developed well enough, since forecasting is closely related to cognitive activity and the formation of a student's forecast is largely determined by his cognitive development and cognitive potential.

4. Purpose of the study

The aim of the research was the experimental study of the prognostic competence of junior school students with persistent difficulties in learning and identifying the specifics of their forecasting in the important for a child spheres of life: learning, communicating with peers and adults, virtual communication, attitude toward illness, and family relationships. An important task of the study was to identify the specific features and criteria of prognostic competence in junior school students.

5. Research methods

5.1 *Participants*

An empirical study involved 80 primary school age pupils at the age of 8-10 years studying in the educational organizations of the Republic of Tatarstan and the Republic of Mordovia.

The first group consisted of 49 junior school students aged 8 to 10 years (26 boys and 23 girls) who study in educational organizations of Kazan and have no difficulty in mastering academic programme.

The second group consisted of 31 pupils (16 boys and 15 girls) aged 8 to 10 years studying at secondary school No. 18 in Saransk and having persistent difficulties in studying.

5.2 Materials

To study prognostic competence, we used the authors' methodology "Prognostic Competence of a Junior School student" (Ability to forecast in the situations of potential or real violation of social norms). The methodology is multifunctional and can be used for screening, a detailed survey of prognostic ability for research purposes, as well as in the development of a strategy of psychological and pedagogical support for a younger student. The methodology allows to reveal the following:

- general level of prognostic ability development of a younger school student;
- the level of regulatory, cognitive and speech-communicative functions of prognostic competence;
- the ability to forecast in each of the six areas of the junior student relationship (attitude toward studying, communication with peers, relationships with adults, virtual communication, attitude to illness, relationships in the family);
- ability to forecast in educational (school) and non-educational (extra-curricular) situations.

The methodology allows us to identify the criteria for prognostic competence in junior school students:

1. Reflection in the forecast of prosocial//antisocial behavior attitude.
2. Mature//infantile forecasting strategies attitude.
3. Optimistic//pessimistic attitude toward constructing the expected concept of the future.
4. Construction of the active//passive position in the forecasted future situation.
5. Variability//non-variability of forecasting prognosis.
6. Detailing//generalization of the forecast.
7. Width//narrowness of the social context of forecasting.
8. Rational//irrational forecast.
9. Maximum//minimum verbalization of the forecast.
10. Completeness//poverty of speech-language means.
11. Presence//absence of participants statements in the forecast.
12. Presence//absence of the future tense category in speech.

6. Results

We have not identified any difference in the regulatory function of prognostic competence among school students. Regulatory function reflects the emotional-motivational side of the future events forecast construction process, its implementation, thereby making it possible for a school student to prepare for the event.

We have identified the differences in samples using statistical analysis (t-Student's test) for the following indicators of prognostic competence:

- *cognitive function of prognostic competence* ($t=1.75$).

School students with no difficulties in studying ($M=30.70$), who were more successful than school students with difficulties in studying ($M=28$), identified cause and effect in the situation of significant relationships, made generalized and evident conclusions and justified the forecast.

• *Speech - communicative function of the prognostic competence* of school students with no difficulties in studying ($M=20.40$) was also more successful ($t=.90$): school students fully described the situation, carried out a pragmatic and realistic forecast of possible events. For school students with difficulties in studying ($M=18.12$), the forecasts are represented by syllable sentences, in the form of simple sentences with poor vocabulary.

Table 1. Prognostic competence of junior school students in significant spheres of relationship

	Having no difficulties in studying (n=49)		Having difficulties in studying (n=31)			
	M	SD	M	SD	t(80)	p
Scales						
Attitude toward studying	10.53	4.01	8.85	1.89	1.89	<.001
Communication with peers	7.61	4.49	10.79	3.93	3.23	<.001
Relationships with adults	11.30	3.69	10.48	3.91	.94	.346
Virtual communication	10.81	4.51	10.62	4.70	.18	.859
Attitude to illness	9.79	4.28	11.29	3.68	1.60	.113
Family relationships	10.74	3.57	10.91	4.34	.20	.845

Statistically significant differences between schoolchildren in two spheres were revealed: in the sphere of attitude to studying and in the sphere of communication with peers.

Attitude to studying. Younger school students with no difficulties in studying were more successful in forecasting the development of situations in educational activity ($t=1.89$). Educational activity as a leading one in the younger school age determines the development of all aspects of the child's psyche – cognitive, regulative, communicative. It includes educational cooperation and educational communication of a child with a teacher and other children.

Communication with peers. Forecasting in situations of interaction with peers not directly related to studying and school life, is more successful in students with persistent difficulties in studying ($t=3.23$).

The average values for health differ in groups of junior school students with no difficulties and with difficulties in studying ($M=9.79$ and $M=11.29$, respectively). However, these values are not statistically significant. School students with difficulties in studying are more likely to take care of their own health, protect it, and strengthen it.

Table 2. Criteria of prognostic competence of younger school students

	Having no difficulties in studying (n=49)		Having difficulties in studying (n=31)		t(80)
	M	SD	M	SD	
Scales					
Prosocial//antisocial behavior	9.93	2.10	11.13	1.38	2.80
Optimistic//pessimistic attitude	4.39	2.23	2.81	2.78	2.80
Active//passive position	5.85	2.09	4.39	3.32	2.41
Detailing//generalization of the forecast	5.61	3.30	2.00	3.18	4.84

The statistical differences in the criteria of prognostic competence in younger school students at the significance level $p < .001$ are revealed.

The forecast of school students with difficulties in learning demonstrate readiness and orientation to socially approved behavior, adaptive behavior strategies ($t=2.80$).

In junior schoolchildren with no difficulties in learning, an optimistic attitude over building the expected image of the future ($t=2.80$) is prevalent. In the forecast a child sees himself, positions himself as an active subject in resolving the situation ($t=2.41$); the constructed image of the future is built on the basis of the situation analysis, a child distinguishes many components of the situation: describes behavior of the participants in the situation, their feelings and attitudes ($t=2.68$).

We have not identified the differences between school students by the criteria of mature//infantile forecasting strategies; variability//invariability of the forecast; detailing//generalization of the forecast; width//narrowness of the social context of forecasting; rational//irrational forecast; maximum//minimum verbalization of the forecast; richness//poverty of speech-language means; presence//absence of participants' utterances in forecasting; presence//absence of the future-time categories in speech.

7. Discussion

The study of prognostic competence of younger school students made it possible to reveal forecasting specifics of students with difficulties in studying. It revealed that the differences relate to cognitive (Artemieva, 2016) and speech-communicative spheres of prognostic competence. As for the regulatory function, the junior students with difficulties in mastering the academic programme and students who master the academic programme successfully, are equally successful in controlling their own activities and activities of potential participants in the forecasted situation, using adaptive strategies of interaction (Akhmetzyanova, 2017). School students with difficulties in learning identified cause and effect relationships in the interaction situations more successfully (Vlasova, 2016), they substantiated the forecast, put forward hypotheses about the future, taking into account the socio-cultural norms and expectations of other people (Bayanova et al., 2016), instantly forecasted their emotional states, adequately assessing the social context.

Differences between school students are also revealed in significant areas. Therefore, if junior school students with no difficulties in learning successfully forecasted the development of situations in the educational activity (Matveeva, 2010), interaction with the teacher and the development of the educational situation (Gavrilyuk, 2006), the school students with difficulties

in learning turned out to be more successful in forecasting relations with peers. In their forecast, the school students with difficulties in learning demonstrate readiness and orientation to socially approved behavior, adaptive behavior strategies. There was no difference between school students in the areas of attitude to adults, virtual communication, family relationships and attitude to illness.

School students who cope with the academic programme and those who have difficulties in learning are equally successful in establishing social contacts, relationships with other adults, outside the school and in families; they are active users of social networks.

According to the criteria of prognostic competence, junior school students with difficulties in mastering the academic programme proved to be more successful in constructing pro-social (adaptive) strategies of behavior. However, according to three criteria, school students with no difficulties in learning showed better characteristics, their forecast is more optimistic, in significant interaction situations they take a more active position, more accurately describe emotions of participants in the situation and the details of what is happening.

8. Conclusion

The analysis carried out in the article made it possible to reveal the deficiency of cognitive and speech - communicative functions of prognostic competence in junior school students with difficulties in learning. Children had difficulties in establishing cause and effect relationships in significant situations, in justifying the forecast; it was more difficult for them to describe the situation in detail, to present a realistic forecast of possible events.

School students with difficulties in learning have the forecast deficiency in the sphere of learning, which includes educational cooperation and educational communication of the child with the teacher and with other children. Pessimistic attitude for building the expected vision of the future is prevailing; in the forecast, the child positions himself as a passive subject in resolving the situation; a vision of the future is viewed in general.

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Burn-out Syndrome and Behavior in Conflict Situations among Nurses and Doctors

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Abstract

Due to its influence on behavior, the burn-out syndrome among nurses and doctors is an actual problem of modern management of medical employees. This study was conducted among 189 nurses and doctors and its aim was to examine the influence of burn-out syndrome on their behavior in conflict situations. The levels of burn-out syndrome and the most common type of behavior in conflict situations in nurses and doctors were studied. The types of behavior in conflict situations could be “competing”, “collaborating”, “compromising”, “avoiding” and “accommodating”, which were measured with the Bulgarian version of The Thomas-Kilmann Conflict Mode Instrument (TKI). Establishing the level of burn-out among nurses and doctors is necessary for purposeful therapeutic work aimed at developing work-related stress tolerance and for better control of behavior in conflict situations.

Keywords: burn-out syndrome, behavior, conflict situations.

1. Introduction

The professions of a doctors and nurses are one of the most noble, humane and necessary professions in the world, but at the same time one of the most difficult, because in the hands of a doctors and nurses are people’s lives. The problem of burnout syndrome among doctors and nurses is relevant to the current stage of psychology development. The popularity of research on this issue is rapidly increasing due to the fact that a significant number of highly qualified doctors have low stress tolerance and are subjected to burnout syndrome. According to Silkina, Sanshokova and Sergeyeva (2014) the implementation of measures aimed at developing emotional and psychological stress tolerance, both during medical training and in the course of further work, it will prevent the formation of a “burnout syndrome” common among doctors. Similarly, professional burnout affects the work and life of nurses (Ivanova, 2017).

The theoretical interest in the topic of burn-out syndrome is due to its practical value. Since the burn-out syndrome occurs in people in the context of their work and has negative consequences for them, all organizations working for psychological well-being are interested in the factors and their consequences. Despite the many research on the topic, interest in it does not diminish. In fact, burn-out is a metaphor. Schalufeli and Enzmann (1998: 1) assert that burnout “describes a state of exhaustion similar to the smothering of a fire or the extinguishing of a candle”.

For the first time the term of staff burn-out was used by the American Psychiatrist H. Frundenberger (1974), in order to describe the psychological and physical state. He revealed frustrations in work, emotional and mental exhaustion, which were defined as defeat, exhaustion, wear and tear, occurring in a person due to excessive demands on their own resources and strength.

Classical manifestations of burnout, as defined by Maslach and Jackson (1996), usually include the following components in the structure:

- Emotional exhaustion,
- Depersonalization,
- Reduced personal accomplishment.

The burnout syndrome is an inability of effectively functions in own professional work, which is the result of prolonged and severe stress (Nenova et al., 2005). In exercising a profession that involves a stressful environment (such as that of nurses and doctors) there is mobilization of internal resources that can have serious consequences. According to a study conducted by Selye (1936) on the onset and development of stress, in the event that a person has been subjected to stress factors for 3 years, stress becomes chronic.

The factors of the working environment that most often affect on the appearance and development of the burnout syndrome can be summarized as follows: overload, unclear roles and role-conflict, lack of control over work, poor communication and lack of positive feedback, stressful interpersonal responsibilities, bureaucracy of the system (Nenova et al., 2005).

This specific psychic reaction called “burnout” is a result of the transformation of motivation in the system “human-to-human” of jobs related to health, education, fight against crime, etc. The professional duties in these working groups require intensive interpersonal communication, cooperation as well as permanent exchange of information (Stamenkova, 2005). At the same time conflict is a natural process in work organizations and in other areas of everyday life.

Based on the individual character of the personality, where there is a significant discrepancy between the expectations and desires of the people, conflict is a natural part of the relationship with others (Riggio, 2015). Thus, in the words of Stankov (2006: 142), “the person is the factor that creates the conflict situation because a conflict outside society and separated from interpersonal relations does not exist”.

In itself, the conflict situation is expressed in a sharp escalation of the tensions that have arisen in a given community as a result of opposing the interests of the members involved in the particular interaction. The conflict situation as an objective incompatibility is precisely the reason for confronting the goals, the ideas, the needs of the participants and the impossibility of realizing it on an individual plan (Dessev, 2006).

Or, as the authors Dontsov and Polosova (1980: 121) summarize, conflicting behavior is a system of “emotionally colored actions”, impeding the achievement of goals by opposing side.

Above all, the situation as a process of action predetermines a certain form of activity. On the basis of this view, the situation has a completely objective character but is broken through the individual's consciousness, transformed into a subjective one. Thus the situation acquires a complex of objective and subjective elements that affect the person for a certain period of time and in response to all this a certain form of behavior.

At the base of each conflict situation is the tension that originates at the beginning can escalate to a very high degree. On the other hand, the tense personality can also have a positive effect, where it leads to increased self-control, the person mobilizes his internal potential to overcome unpleasant life situations, expand experience, and strengthen the will. In this way,

Mysliffchenko admits that these critical moments are important for building individuality in the consciousness and the moral persistence of the individual (Mysliffchenko, 1977).

Kenneth Thomas and Ralph Kilmann elaborate a tool which measure person's behavior in a conflict situation where the interests between are not incompatible. It is in such a situation that a person's behavior can take two dimensions: assertiveness, the degree in which person seeks to satisfy its own interests and co-operativeness, the extent in which it tries primarily to satisfy the interests of other people (Kilmann & Thomas, 1977)

Thus, according to the Thomas-Kilmann Conflict Mode Instrument (TKI), there are two dimensions of human behavior, which unlock five models as a response in a conflicting situation (Thomas, 1992):

- Competing – characterized with confidence and non-cooperation. This is a powerful-oriented model that uses all appropriate ways to reach its own personal position;
- Adaptation – distinguished by insecurity and cooperation. It relates to the fact that the person ignores himself satisfy, then care about interests of others. Sometime it is like element of sacrifice in the name of foreign well-being;
- Avoidance – instability and non-cooperation. With this model, the person does not pursue either its own interests or of the others one. In this way, it distanced itself from the conflict situation. Avoidance can be expressed as diplomatically avoiding the problem, postponing it to a more appropriate moment, or simply withdrawing from the threatening conflict situation;
- Collaboration – in the same time is sustainability and co-operative. It is about trying to engage in teamwork with others to find solutions, which is acceptable to everyone's interests. It also includes attempts to find a creative solution to interpersonal problems;
- Compromise – moderation in sustainability and cooperation. The main purpose of this method is to find solution that will satisfy everyone in conflict situation. In some cases, the compromise may mean splitting the differences between two positions, exchanging interests, or looking for a quick solution.

2. Aim

The main aim of this study is to follow actual level of burnout syndrome and most common type of behavior in conflict situations among nurses and doctors in Bulgarian hospital.

3. Hypothesis

Our main suggestion is that there are differences in level of burnout syndrome among nurses and doctors with different main type of behavior in conflict situations:

(1) We suppose that there will be statistical significant differences in “reduced personal accomplishment” between males and females.

(2) We assume that nurses will have higher *emotional exhaustion* than doctors, also doctors will have higher *dehumanization* than nurses.

4. Methodology

This research was conducted in a Republic of Bulgaria, in Blagoevgrad town, through period from September to October 2018. To determine the professional burnout syndrome, was used the most popular tool MBI (Maslach burnout inventory) in its Bulgarian version. The

questionnaire includes three scales: “Emotional exhaustion” (EI); “Dehumanization” (DH); “Reduced personal accomplishment” (RA) (Tsenova, 1992). The types of behavior in conflict situations could be “competing” “collaborating”, “compromising”, “avoiding” and “accommodating” which were measured with the Bulgarian version of the Thomas-Kilmann Conflict Mode Instrument (TKI) (in Ivanov, 1999). There are examined 189 medical employees (doctors and nurses) from Multiprofile Hospital for Active Treatment in Blagoevgrad, between 24 and 65 years ($M=43.82$; $SD=12.54$). For statistical analysis SPSS 16 was used.

Table 1. Social-demographic characteristics (sex, age, profession) of the participants

Characteristics	N (189)	%
Sex		
Male	71	37,6
Female	118	62,4
Age		
20-30	46	24,3
31-40	52	27,5
41-50	27	14,3
51-60	41	21,7
61-70	23	12,2
Profession		
Nurse	98	51,9
Doctor	91	48,1

5. Results of research

In this study we hold on Maslach’s suggestion to use the scales of MBI one by one, then to evaluate common ball (Maslach & Jackson, 1996). According to our main aim to follow actual level of burnout syndrome and most common type of behavior in conflict situations among nurses and doctors in Bulgarian hospital, we find out that 51.9% of the participants in our research have high level of “emotional exhaustion”. Similar results are also found on the “dehumanization” scale, where 53.4 % of surveyed persons show high values. In terms of “reduced personal accomplishment” there are 44.4% of participants with high level results (Table 2). As a conclusion of these results, it can be argued that half of medical workers who participated in the study had a high level of burnout syndrome.

Table 2. Levels of the MBI-scales (number and percentage)

MBI scales	Low level	Middle level	High Level	Total
<i>Emotional exhaustion</i>	N (%)	N (%)	N (%)	N
Doctors	4 (4.4%)	30 (33.0%)	57 (62.6%)	91
Nurses	20 (24.4%)	37 (37.8%)	41 (41.8%)	98
Total	24 (12.7%)	67 (35.4%)	98 (51.9%)	189
<i>Dehumanization</i>				
Doctors	22 (24.2%)	10 (11.0%)	59 (64.8%)	91
Nurses	25 (25.5%)	31 (31.6%)	42 (42.9%)	98
Total	47 (24.9%)	41 (21.7%)	101 (53.4%)	189
<i>Reduced personal accomplishment</i>				
Doctors	12 (13.2%)	17 (18.7%)	62 (68.1%)	91
Nurses	49 (50%)	27 (27.6%)	22 (22.4%)	98
Total	61 (32.3%)	44 (23.3%)	84 (44.4%)	189

The second part of our main aim is to find out the most common type of behavior in conflict situations among nurses and doctors in Bulgarian hospital. It was found that most of the

participants in this research react with “competing” in conflict situation (37.6%) and with “compromising” (33.9%). That means that competing and compromising are the most common type of behavior in conflict situations among medical workers, who participated in current research. In terms of the profession – 51.6 % from doctors react with competing in conflict situations. For nurses the most common behavior in conflict situations is compromising – 32.7 % from nurses (Table 3).

Table 3. Type behavior in conflict situation among doctors and nurses (number and percentage)

	Doctors	Nurses	Total
Type behavior in conflict situation	N (%)	N (%)	N (%)
Competing	47 (51.6%)	24 (24.5%)	71 (37.6%)
Collaborating	0 (0%)	18 (18.4%)	18 (8.5%)
Compromising	32 (35.2%)	32 (32.7%)	64 (33.9%)
Avoiding	10 (11%)	15 (15.3%)	25 (13.2%)
Accommodating	2 (2.2%)	9 (9.2%)	11 (5.8%)
Total	91 (100%)	98 (100 %)	189 (100%)

For proving the hypothesis different statistical analysis was used. For first suggestion that there are statistical significant differences in “reduced personal accomplishment” between males and females independent Samples T-test was used. The procedure finds significant differences in scale “reduces personal accomplishment” between males and females: $T(189)=1.976$; $p=0.5$ with $M_{(males)}=37.07$; $SD_{(males)}=6.37$ and $M_{(females)}=34.17$; $SD_{(females)}=8.32$. The observed means show higher levels of “reduced personal accomplishment” for the males in compare with females and the results are statistical significant ($p=0,5$), so the first hypothesis is approved.

Independent Samples T-test for other MBI scales was used. Significant differences in “emotional exhaustion” between males and females was found: $T(189) = 4.736$; $p=0.00$ with $M_{(males)}=38.90$; $SD_{(males)}=12.25$ and $M_{(females)}=30.31$; $SD_{(females)}=11.96$. That means what males in current research are more emotionally exhausted then females. With regard to “dehumanization”, the results are analogous: $T(189)=4.332$; $p=0.00$; $M_{(males)}=18.15$; $SD_{(males)}=9.59$ and $M_{(females)}=12.27$; $SD_{(females)}=8.67$.

Our second hypothesis is that nurses will have higher emotional exhaustion than doctors, also doctors will have higher dehumanization than nurses. For proving the first part of the hypothesis T-test was used. Following the used statistical procedure were found significant differences in “emotional exhaustion” between doctors and nurses: $T(189) = 4.483$; $p=0.00$ with $M_{(doctors)}=37.64$; $SD_{(doctors)}=12.16$ and $M_{(nurses)}=29.72$; $SD_{(nurses)}=12.11$. In other words these results display that doctors have higher emotional exhaustion than nurses. Despite significant results, the first part of our second hypothesis is not approved.

About finding differences in dehumanization among nurses and doctors again T-test was used: $T(189)=1.245$; $p=0.215$ with $M_{(doctors)}=15.37$; $SD_{(doctors)}=9.63$ and $M_{(nurses)}=13.66$; $SD_{(nurses)}=9.23$. The observed means display higher dehumanization in doctors than in nurses, but the results are not statistically significant, so the second part of the second hypothesis is not approved.

The differences in “reduced personal accomplishment” among doctors and nurses were also checked. The T-test found statistical significant differences between the groups: $T(189)=7.722$; $p=0.00$ with $M_{(doctors)}=39.80$; $SD_{(doctors)}=5.62$ and $M_{(nurses)}=32.25$; $SD_{(nurses)}=7.58$. The presented results show a higher “reduced personal accomplishment” for doctors compared to nurses.

Our main suggestion is that there are differences in level of burnout syndrome among nurses and doctors with different main type of behavior in conflict situations. For this hypothesis nonparametric test of Kruskal-Wallis was used. The results show higher emotional exhaustion, dehumanization and reduced personal accomplishment in participants with competing as a behavior in conflict situations in compare to participants with other main type of behavior in conflict situations. So our main hypothesis is approved.

Table 4. Results from nonparametric test of Kruskal-Wallis for finding significant differences in components of burnout for participants with different main type of behavior in conflict situations

MBI scales	Type behavior in conflict situation	MR	X ²	df	p
Emotional exhaustion					
	Competing	130.02	53.914	4	0.000
	Collaborating	75.14			
	Compromising	62.99			
	Avoiding	94.72			
	Accommodating	88.32			
Dehumanization					
	Competing	121.80	36.058	4	0.000
	Collaborating	92.67			
	Compromising	67.03			
	Avoiding	101.70			
	Accommodating	73.32			
Reduced personal accomplishment					
	Competing	117.15	26.339	4	0.000
	Collaborating	59.97			
	Compromising	93.80			
	Avoiding	71.46			
	Accommodating	69.77			

6. Discussion

According to all three components of burnout syndrome: emotional exhaustion depersonalization and reduced personal accomplishment and the obtained mean values it can be said that the doctors are with higher burnout syndrome in compare with the nurses. It was found that 51.9% of the medical workers have high level of “emotional exhaustion”. Similar results are also found about the “dehumanization”, where 53.4 % of them show high values. In terms of “reduced personal accomplishment” there are 44.4% of participants with high level results. Competing and compromising are the most common type of behavior in conflict situations among medical workers. Doctors react with competing in conflict situations and for nurses the most common behavior in conflict situations is compromising. It was found that there are differences in level of burnout syndrome among nurses and doctors with different main type of behavior in conflict situations. The established results relate only for those who participated in this study.

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EU Information Policy as a Factor of Sustainable Development

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Abstract

EU information policy emerged only in the mid-1980s as a set of mutually related strands and policy decisions. Two levels of information policy are essentially developed. One is related to the information society and its infrastructure, and the other to access to information. Apart from the focus of the information industry, ranging from telecommunications, the Internet and e-services, the problem of information policy and the global information society is related to macro, micro and meso-economic levels. Here is the link with the sustainable development strategy. Sustainable development is seen not only in the narrow sense of the word as an element of environmental and regional policies, but also in the possible broader view – as a principle of responsible governance for achieving social cohesion, as one of the possibilities for the EU to consolidate internally with aid from the information policy, despite strong centrifugal trends in European integration. At a time when the EU is moving into a new phase of political integration, there is a need for an open debate on the finality, structure and political scope of reunification. From what trends will prevail – decentralization or vice versa – the consolidation depends on the future of the world and its development.

Keywords: European Union, information policy, sustainable development, communication strategy, information society, development policy.

1. Introduction

EU information policy emerged only in the mid-1980s as a set of mutually related strands and policy decisions. To some extent, this could be attributed to the need for regulating specific entities and to the fact that it is subject to the complex harmonization process within the Union. Its late development compared to other common policies directly correlates with the EU's own institutional maturity – on both horizontal and vertical level. Precisely for this reason, in the European Communities' founding treaties could be spotted only the rudiments of what would later become a more structured information policy.

In general, the Community's primary legislation already provided grounds for the establishment of independent information policy. For the development of the Single Market, the treaties envision beneficial information environment to promote the formation of transeuropean networks and the utilization of scientific research by small and medium enterprises. Information in scientific research is addressed in the Treaty on the establishment of the European Economic Community, article 129 from “a” to “c”. This article also lays the foundation for common policy in the field of telecommunications. In article 130 of the Treaty establishing the European Economic

Community as well as in the Treaty establishing the European Atomic Energy Community, R&D promotion is associated with the dissemination of technical information. In the latter treaty, the same articles served as foundation for the launch of pilot projects and framework programs in the fields of science and technology. In these and other clauses of the treaties information is classified into three types. The first one is public information that institutions have the obligation to disclose. Usually this relates to the transparency in procurement bids or consumer protection. The second type of information is the one provided voluntarily, based on contracts between the Community and third parties, while the last one refers to data protection¹. Research in science and technology falls precisely into these confidentiality clauses.

In practice, the institutional prerequisites for shaping the information policy appear quite late. That is why its components such as information society's infrastructure and the new technology markets are provided for in more detail only in the EU's secondary legislation. The Maastricht Treaty of 1993 partially filled this void by opening the prospects for coordinated measures and for the development of transeuropean transport, telecommunication and energy infrastructure networks. These measures need to be implemented under the conditions of the internal market, in a competitive environment, which pushed for the improvement of internal linkages and the operative capacity of national networks. In this manner much more coordinated actions are initiated among member states as well as efforts to converge the infrastructure levels of the Community's periphery to those of the core².

2. The information policy

According to Sandra Braman, information policy appeared as a research area in the latest decades of the 20th century as a symbol of the transition from industrial to information society and parallel to the emergence of information studies on micro- and macro-economic level. She defines "information policy" as a mix of doctrinal positions, followed by regulations, lawmaking or decisions and practices with society-wide constitutive effects involving information creation, processing, flows, access and use³. Information policy incorporates decision making and practices that determine under what conditions we learn about the factors influencing our lives; the way we converse and share problems of common interest; how we exercise our rights as individuals and as a community. It is based on legal and political language derived from the world of human rights and civil liberties⁴.

In the European Union, in a wider sense, information policy is related not only to *acquis communautaire* in the field of telecommunications and media production but also with the internal aspects of information flows. In the widest possible meaning, it is an activity regulating the information society including telecommunications and electronic media, the media sector, EU citizens' access to information, EU institutions' PR activities as well as the overarching legal framework for all these activities. The wider interpretation and the actuality of this sector policy analysis are necessitated by the fact that it is the most dynamically changing policy in the recent years as it is charged with defining objectives, guiding, regulating and controlling an ever expanding scope of new activities.

¹ Osnovni dogori na Evropeiskiya Sayuz [European Union's Main Treaties]. Vol. I, CES, Sofia, 1997, p. 192.

² Maastricht Treaty, t. XII, art. 1296. p. 129; Zankova, B. Za evropeiskoto mediino zakonodatelstvo [On European Media Legislation]. *Documents from National Conference on European Media Legislation in Bulgaria*. Sofia, 4th April 1998, p. 9.

³ Braman, S. (2011). Defining Information Policy. *Journal of Information Policy*, Department of Communication, University of Wisconsin- Milwaukee, 1(1-5), 3.

⁴ *Ibid.*, 5.

Two primary dimensions emerge in this field. The first one relates to the information society and its infrastructure while the other is associated with the access to information. Aside from being in the focus of the information industry spanning over telecommunications, the Internet and e-services, the problem of information policy and the information society is linked to macro, micro and meso-economic levels.

In the aspect of information flow management and the citizens' access to information rights, it is considered as integral part of democratic Europe. This right is twofold: belonging simultaneously to the European institutions, on one side, and on the other to physical and legal persons. The access to information right of EU institutions, the European Commission in particular, aims at facilitating its operation and is provided for in all three of the founding treaties – Treaty establishing the European Coal and Steel Community (1952), Treaty establishing the European Atomic Energy Community (1957) and Treaty establishing the European Economic Community (1957). The first direct elections for European Parliament (1979) enforced the understanding that information policy is to become an instrument for creating European political identity and common European consciousness. European institutions themselves should not detract from their mission to raise awareness among the citizens about their role, long- and short-term policies.

Even back then the weak media interest in the Community was recognized as a shortcoming which was a result of the lack of coordination in information campaigns, stemming from the absence of concrete provisions on information policy in the founding treaties. This legal vacuum allowed for autonomy of each institution in the Community to implement its own European Information and Communication Policy (EICP)⁵. The European Parliament turned out to be the reform initiator. In a parliamentary report dated 11 December 1986 is stated that information policy should include the two equally important aspects – information and communication – and should serve public interest. In this manner the two separate dimensions of one and the same policy were defined.

In the 90s the European Commission started implementing a new approach based on several significant findings. Even today institutions are sensitive to the issue of democratic deficiency and lack of transparency which triggered not only changes in the legal framework but also internal restructuring of information flow within the EU. The above-mentioned legal documents together with De Clercq's report from 1993⁶ led to the creation of a public opinion monitoring system and to the adoption of a new approach by the Commission. In a series of communications the EC concluded that the critical perception of certain aspects of its policy is to large extent a result of insufficient citizen awareness. In a 2001 communication, member states' crucial role in the dissemination of EU-related information is recognized and is proposed the establishment of an interinstitutional group for information and coordination of common and specific information activities. In 2002, the Commission published Information and Communication Strategy aimed at strengthening cooperation with the European Parliament and, most of all, among member states on the communication of EU policies. In July 2005, the European Commission approved Action plan to improve communicating Europe which defines communication as "one of the strategic objectives" and acknowledges it as "a policy of its own" as

⁵ Kornazheva, M., & Shipkova, R. (2013). Aktualna potrebnost ot izsledvane na informatsionnata I komunikatsionnata politika na Evropeiskiia sayuz [Current necessity for Studying the Information and Communication Policy of the European Union]. In *Nauchni trudove na Rusenskiya universitet*, Vol. 52, series 5.2, p. 78.

⁶ Reflection on Information and Communication Policy of the European Community (1993). Report by the group of experts chaired by Mr. Willy De Clercq Member of the European Parliament. March 1993 [cited 11.06.2018]. Available from http://aei.pitt.edu/29870/1/DE_CLERCQ_REPORT_INFO_COMM_POLICY.pdf.

well as “a significant part of the political process”. It is followed by a White Paper on a European communication policy in February 2006⁷.

Shifting the paradigm on the essence of information is related to the expectation for the emerging signs of a European public sphere. Michael Brüggemann talks about removing barriers as a different approach, named “Öffentlichkeit”, for the implementation of a more democratic information policy with the goal of strengthening the public sphere⁸. At the same time a group of researchers also reached the conclusion that there is a need for mutual penetration of national public spheres in favor of transnational dialogue as part of implementing a stable policy acknowledged by the public at large and the member states. EU information policy also has to be transformed into internal communication among member states. Bernhard Peters suggests that the Europeanization of the public sphere should be treated as an interdisciplinary process⁹. One of the notions is to consider the European public sphere in the context of network society and as linked information flows, i.e. to take into consideration the emergence of new media. It is necessary to achieve coordination between member states’ national information programs and to include them in the transnational information networks of a changing European space. Three factors determine the need for new initiatives. The first factor comes from the new challenges of the information society. Its development has moved from the “pilot project” to “widespread” phase. The second factor is the completion of the eEurope 2005 Action Plan. The third factor comes from the need to revise the Lisbon Strategy.

In 2009, the Commission reviewed the Telecoms package by adopting the Better Regulation and Citizens Rights Directives and introducing the Body of European Regulators for Electronic Communications (BEREC). In line with these recommendations, the European Commission formulates the Five Year Initiative 2010, the main points of which are set out in a Commission Recommendation. As the experience of the Lisbon Strategy and the text of the Recommendation show, this document largely defines the content of all the European Union's follow-up initiatives on the information society, the national development strategies in this field and will thus define the legal framework for the development of the new relations. In the 2010 initiative, the European Commission identified three main priorities. The first priority is to create a common European information space that offers accessible, secure and fast communications, digital services, rich and varied content.

The second priority is to increase innovation and invest in research. The goal is to achieve a world level of development in information and communication technologies by overcoming the gap between Europe and its main competitors. The initiative envisaged the removal of technological, organizational and legal barriers to the implementation of research results.

The third priority is to create an inclusive European information society. The increased use of information and communication technologies has a noticeable impact on society. The 2010 initiative foresees conditions that enable all citizens to use new technologies and create better, cheaper and more accessible public services to improve the quality of life through new health and social services.

The European Commission adopted an Action Plan on eGovernment and Strategic Orientation of Public Services (2006) as part of the Sustainable Development Strategy and set a deadline for the creation of demonstration technological, legal and organizational solutions for the

⁷ Kornazheva, M. 2013, p. 80.

⁸ Brüggemann, M. How the EU Constructs the European Public Sphere: Seven Strategies of Information Policy Bremen, 2005, p. 9.

⁹ Cf. the definitions of the public sphere by Habermas (1992, 436); Peters (1994, 45) and Gerhards (1998, 694).

provision of public online services. The aim was to eliminate the geographical and social “digital divide” and to develop a European e-Inclusion Initiative (2008).

The “three bases” of the 2010 initiative are the creation of a modern, market-oriented regulatory framework for the digital economy; secondly, the use of European research and development tools for digital convergence and co-operation with the European private sector for the purposes of innovation and technology championship; third, the development of an inclusive European information society, supported by effective and consumer-oriented public services.

The initiative proposed that Member States, within the framework of their national reform programs, should adopt the priorities of the information society. In this way, Member States could increase the cost of research in the field of information and communication technologies; to develop modern and compatible public services based on new technologies; to adopt ambitious targets for the development of the information society at national level.

From the legal point of view, the analysis of the initiative leads to the general conclusion that in the period 2006-2010, The European Commission has made a substantial update on the content and objectives of the information society.

3. Sustainable development

Sustainable development is the overarching long-term goal of the EU reaffirmed in the Amsterdam and Lisbon Treaties. The Sustainable Development Strategy of the European Union as revised in 2006, is a framework for a long-term vision of sustainability in which economic growth, social cohesion and environmental protection go hand in hand and are mutually supporting¹⁰. In recent times and in the context of the information society, achieving sustainable economic growth and social cohesion in the EU is unified in the formulation of three priorities: smart, sustainable and inclusive growth.

The main aspect of sustainable development policy is the development of long-term objectives, rules and priorities that would become the founding principle of every other policy implemented by member states or the Union. Within the current global and multi-faceted crisis the groundwork of sustainable development policy, generally seen as management of the “human-nature” system, should be changed to include brand new parameters and should re-orient its goals. The processes taking place in the EU are characterized by the same basic features – the regrouping and lagging of peripheral regions and the concentration of capital in the richer countries of the Community. In this context, information policy lags significantly behind the real global Millennium Goals. Europe's sustainable growth and prosperity strategies based on the knowledge economy are being implemented in an extremely complex environment over the past 10 years. The re-evaluations of the Europe 2010 program are focused on bringing to the fore the tasks that are oriented towards the realization of a social market economy. We see that this process is also inconsistent, and for the Eastern European countries that join later and for whom the social market economy is far from the same in content, scope and resources as in the big EU club. Overall, the achievement of sustainable economic development and social cohesion is united in the three defined priorities: smart growth, sustainable growth, inclusive growth.

In 2016, the EU is aware of the need to update goals and concepts to modern challenges. This is also a time of huge challenges to sustainable development. In this sense, the following directions are outlined, which are its updated subtopics. The burden of responsibility for the future development of the EU also means responsibility for the future of mankind and that is

¹⁰ Communication from the Commission to the European Parliament, the Council, European Economic and Social Committee and the Committee of the Regions. *Mainstreaming sustainable development into EU policies: 2009 Review of the European Union Strategy for Sustainable Development*.

why the spheres of social cohesion are outlined. The European Commission recognizes that billions of citizens continue to live in poverty and deny them a decent life. There are increasing inequalities in and between countries. There are vast differences in possibilities, wealth and power. Gender inequality remains a major challenge. Unemployment, especially youth, is also one of the EU's main concerns. Not only that. Sustainability also affects global health threats, more frequent and intense natural disasters, spiraling conflict. Both the violence and the extremism of violence, terrorism and related humanitarian crises and the forced exodus of men threaten to make much of the progress in EU and global development over the last decades. The depletion of natural resources and the adverse effects of environmental degradation, including desertification, drought, land degradation, fresh water shortages and biodiversity loss, add to and deepen the list of challenges facing humanity. Climate change is one of the greatest challenges of our time and its adverse impacts undermine the ability of all countries to achieve sustainable development. Increasing global temperatures, rising sea levels, ocean acidification and other climate change impacts are seriously affecting coastal areas. We see the evolution of concepts and the development of the sustainable development strategy. In the rationale of the new plan, the EC has also highlighted an important moment related to information policy and how to communicate with the public in terms of addressing the issues facing sustainable development. The Commission has acknowledged that key data on several of the objectives remain inaccessible and called for more support to gather information on capacity building in the Member States and to develop national and global underlying databases where they still do not exist. The Commission is committed to addressing this gap in collecting information to better reflect and perceive better measurement of progress in society, especially for those that do not have clear digital indicators.

At a first glance, there is no direct link between EU's information policy and sustainable development strategy. However, looking deeper, it is an issue of the Community's capability to tackle internal crises through long-term development programs. Such programs are associated with public relations as well as information infrastructure development and the creation of the information society intended as a tool for improving EU's competitiveness. In this sense, information and its "packaging" has turned into a key resource.

In its own right, sustainable development comprises a complex amalgam of governing, economic, environmental and social aspects. It is an aspiration for reaching a certain standard of living for the population and, most of all, for a balance between economic policies that utilize zero waste technologies, renewables and recycling aimed at resource exploitation that does not worsen long-term economic parameters influencing human life.

In order to find the direct link between information policy and sustainable development, the latter needs to be regarded as an aggregation of different factors. It is not purely an element of environmental and regional policy. It is a principle of responsible governance for achieving social cohesion as one of the ways for the EU to reach internal consolidation with the help of information policy despite recent centrifugal trends.

Demystifying the connection with sustainable development strategy precisely through the different interaction levels with information policy shows the way the whole information policy spectrum has been established through the years – from information society's infrastructure with telecommunication and audio vision to the specific PR methods employed by different EU institutions. In this regard, EU information policy is inevitably connected with the global trends and the Community's future. However, it is also related to the governance model on supranational level and the preservation of democratic values ensuring sustainability. It ascertains the selection and promotion of economic development strategies which take stock of environmental protection

and biodiversity conservation while maintaining citizens' social rights¹¹. And this undoubtedly includes access to information and to the advantages of new information technologies. The "EUROPE 2020" document is an attempt to fully mobilize the single market tools and financial levers in combination with a more active external policy for tackling the crisis threats which exclude the concept of manageable chaos that could reach a critical point¹². Nowadays, the basic requirements for achieving sustainable development such as poverty eradication, change in consumption and production models, protection and prudent use of the environment in favor of socio-economic development¹³, are insufficient in terms of the deficit for real and speedy political decisions. These goals seem to fade away despite solving these high ranking questions being now not only an internal European case and a complex decision-making process stemming from EU acquis. In such manner, each and every one of Eurointegration's founding principles clashes individually or aggregately with the established state systems of member states and their interests in times of crisis.

European institutions' information and communication policy ought to reaffirm the importance of sustainable development in the minds of European citizens. Precisely in this same spirit could be interpreted the paradigm shift in UN's 2030 Agenda for Sustainable Development. Approved in September 2015 by all UN members, the agenda is a new ambitious action plan for tackling global trends and challenges. At its core stand 17 Sustainable Development Goals (SDGs) and their related sub-goals up to the year 2030. The change consists in putting forward a new development model which in the long run should be more resilient in economic terms, more socially inclusive and environmentally viable.

European Commission's response is to a large extent reactive but also constructive. In November 2016, EC presented a new strategic approach to achieving sustainable development in Europe. One of the Communications to the other European institutions stipulates how EC's 10 policy priorities contribute to the implementation of UN's 2030 Agenda and how the EU will reach the SDGs in the future. The second aspect is the new European consensus and mechanism for creating a vision and cooperation framework in the field of sustainable development. The motion for new European coordination is in line with the shift in the cooperation model provided in Agenda 2030 in response to the increasingly more complex and interrelated challenges that the world is faced with today. It defines an action regime for all European institutions and the member states. The question now is whether EU institutions will use the principles and ideas presented in Agenda 2030 as an opportunity to set out a new, proactive, transformative and positive narrative for Europe, as the European Economic and Social Committee as well as many civil society stakeholders have called for: "a new vision of a more sustainable and socially inclusive Europe that benefits its citizens and leaves no one behind; a forward-looking vision, building on the values which have made Europe a successful model: solidarity and human rights, social justice and equality, democracy and participation, entrepreneurship and environmental responsibility"¹⁴. The EESC recommends the introduction of a framework for governance and coordination alongside

¹¹ Report of the World Commission on Environment and Development (1987). In: *Our Common Future*, p. 12-30.

¹² EUROPE 2020 (2010). *A Strategy for smart, sustainable and inclusive growth*. Brussels, p. 6.

¹³ Audit Report №0600021203 (2004). Tselite na ustoichivoto razvitie, otrazeni v natsionalnite strategii I programi, vkluchvashti integriraneto na ikonomicheski, sotsialni I ekologichni aspekti [Sustainable development goals incorporated in national strategies and programs integrating economic, social and environmental aspects]. Bulgarian National Audit Office. Sofia, p. 15.

¹⁴ Opinion of the European Economic and Social Committee on the "Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions Next steps for a sustainable European future. European action for sustainability" (COM (2016) 739 final) (2017/C 345/15). <https://eur-lex.europa.eu/legal-content/BG/TXT/PDF/?uri=CELEX:52017AE0277&from=BG>.

the long-term strategy for the implementation of the 2030 Agenda, in order to “ensure coherence between centralized and decentralized measures, as well as to involve organized civil society at national and regional levels”¹⁵.

4. Conclusion

Information policy is still only an institutional sub product of the EU and not so much a common and consolidated political platform. In this regard, every founding element of integration related to sustainable development in the context of information policy is interpreted in a limited scope. Thus, the way the EU legal framework functions defines the priorities and principles of presenting information, different aspects in the field of sustainable development included. And despite the plethora of documents addressing transparency in decision-making, the public at large in the member states expresses skepticism like never before.

The answer to the current predicament ought to be sought in the strengthening of European democracy. Of course, it is not a panacea for solving all issues at hand but European integration cannot move forward without a more democratic Europe. This directly concerns information policy. EU cannot continue to view its legitimacy solely through economic indicators but needs to find a way to also evaluate the state of democratic self-determination to whose formation it has contributed through its overall development.

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¹⁵ *Ibid.*, par. 4.3.1.

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Sociology and Epistemology

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Abstract

The thesis I want to raise, or I would rather like to suggest, as a subject of discussion, without rushing into a solid argument in its favor which is inspired intuitively, probably is the result of years of work on epistemological issues, using the sociological perspective for this purpose. In the search for fundamental basis of science and sociology in particular, I am increasingly convinced, that the idea of sociology as a fundamental science could be one of the sequels of epistemology. This probably sounds like a cliché as “any science is epistemology”, but I dare say that there are reasons, background, and it may be said, that the first step was made by the philosophy of positivism and the evolution and formation of sociology as an independent science, but also continued in the tradition of the sociology of knowledge.

Keywords: sociology, epistemology, anthropology.

The sociological alternative to classical epistemology is not simply the “injection” of sociology as a life-saving obsolete epistemological body element. It aims to put a new beginning in the consideration of the problems of knowledge, in a social aspect of sociological and anthropological nature.

It seems to us that the natural next step in the development of epistemology (after the classical epistemology, sociology of knowledge, the “strong program” and social epistemology) and the overcoming of the crisis in it is the transition to anthropoepistemology¹.

This is not about interdisciplinarity, but about strengthening the knowledge aspect in sociology and anthropology of knowledge, walking hand in hand. The sociology of knowledge has to be addressed not only by scientific communities, like Mannheim, but also by the “strong program” of the Edinburgh School of Sociology of Knowledge, but also under the influence of a phenomenological position in relation to the knowledge of social agents on a daily basis that construct reality. The new name of sociology of knowledge could be anthropoepistemology if epistemological science should be continued. Anthropoepistemology will be the connecting link between sociology and, more precisely, the sociology of knowledge and epistemology in its further development.

¹ James Maffie is the creator of the term anthropoepistemology. He is associate professor (PhD) in the University of Michigan since 1988. His fields of work include: epistemology, philosophy of science, and others. He has publications in the journals Philosophical studies, Social epistemology, Philosophy of Social Sciences, and many others.

The socio-cultural prerequisites of knowledge will be included in the anthropoepistemology and this will be an adequate approach to the treatment of epistemological issues of a sociological nature. We must learn to understand the beliefs and beliefs of social agents if we also want to assess their activity and behavior. The cognitive prerequisites of individual actions can be the subject of cognitive psychology, but the social aspect of what agents know and recognize in social fields of meaning will be the real epistemological successor to a sociological view of the problem of knowledge.

The scientists are those social individuals who possess a large set of cognitive assessments. The ability of agents to make an epistemological assessment will be a need and necessity related to human activity.

The accumulation of knowledge and the formation of beliefs not only in the professional but even in the life aspect is dictated by the socio-cultural environment. This environment is not constant and is also formed in the everyday activities of individuals. Everyday tensions arising from the problem of what is true and what is not, will constantly accompany us in connection with the individual interpretation of values, rules and behavior. This is particularly characteristic of the modern and postmodern era, where the processes of individualization in most areas of Western man's life are enhanced.

To put the materialist worldview as the most characteristic of Western civilization and culture is to deny not only the importance of the spiritual values of civilization but also the cultural continuity that takes place through intercultural communication based on similarities between them. The problem of worldview on the meta-cultural level or the symbol universes is directly related to the subject-matter of this work.

Today, it is really not difficult to choose your beliefs and beliefs, as we live in the age of the information society and attempts to censor the power of the authorities either in the sphere of art (see in Bourdieu – *Speech to the Lords of the World*) and even in political space fails in the presence of the vast information space – the Internet, but it also depends on the critical attitude of the agents or their ability to epistemological assessment. In modern times, the forms of individual expression and behaviors belonging to different worlds are many.

The information technologies are synonymous with freedom of information and freedom, understood in the widest sense. The radical understanding of epistemological attitude is related to the fact that we will seek the historical justification of beliefs in the socio-cultural environment rather than the logical relationship between judgments. These are not only the collective, but also the individual beliefs and beliefs of the people.

The anthropoepistemology and the social epistemology will also bring to the fore a fuller productivity of the problem of veracity. Here, we can even put the appeal that Pierre Bourdieu calls for “to look for the logic of things, not the logical things”. Such a style of thinking will result in a broad context of social significance of truth and reason in which social agents are convinced and believe what they regard as truth and error. In the context of phenomenological sociology whose position we have not abandoned – the epistemological will be synonymous with social rationality and consciousness capable of uniting and dividing the world around us. The attitude towards values contains within us also irrational moments, which we will technically call non-epistemological or intuition.

Ordinary or everyday language, unlike the symbolic of mathematics and mathematical logic, contains more non-epistemological prerequisites if we can express it in this way. The very essence of everyday language does not contain within itself the same amount of universalism as the scientific one. He is permeated by a series of persistent self-refuting judgments, and hence the attitude to what is a true claim will be to what is “maximal – true” or “minimal – true” (mainly subjected to emotions) as subject to falsification to the highest degree. Bourdieu argues that the

essence of language is that being “meaningful and meaningful is the same thing”. Individual assessment is a pledge of truth, understood by us through rational and irrational (feeling) prerequisites. The dynamics of social knowledge allows more creativity in the attitude towards the social universe. The beliefs and beliefs of social agents, unlike classical epistemology, are at the heart of social evolution, as they have the ability to more often self-refute in non-democratic communities and pluralist groups.

The mix of rationality, intuitions and feelings – the attitude towards values and beliefs is developing with the emergence of new cultural and social changes. The impact of science and technology is immense, but not enough to form new, more rational, perceptions of social agents. Because of the broad aspect of the everyday life of cultural continuity, social norms and values consist of changing not only the epistemological (rational) but also non-epistemological (intuition and feelings) collective and individual attitude induced by the new changes in order to memorize them and their latest reformulation.

Reconsidering the subject of social beliefs and knowledge in terms of the truth and error will increasingly be in terms of criteria that the agents build on their own. This will be the most important issue for social construction of reality. Develop social criteria for authenticity and credibility by agents themselves.

Such processes form in social agents symbolic (linguistic) universes of a new type. The results will be the formation of more specific criteria for truth, sample and error. Agents will not accept everything apparent at the first glance as true, but from the point of view of the survival of beliefs and beliefs in a more utilitarian sense. Long ago in sociology, there has been talk of existence not only of scientific but also of social rationality, and it is precisely that which affirms this concept in the scientific literature. In this paper, we concretize and develop to the highest degree the significance of this rationality in the context of the sociology of knowledge and anthropoepistemology.

The re-identification of problem by the truth and the error in the logical relation between judgments to the beliefs and beliefs of the people is the outcome of the crisis in which epistemology has entered. Criteria of truth will come to the level of everyday consciousness and will be interpreted in a socio-cultural and anthropological context.

The epistemology must to keep a relatively distant position to understand what the criteria of truth are, but already oriented towards social things and to understand their internal logic. The conflict of value attitudes is linked to the diversity of everyday life and is indicative of the existence of feminist, anti-racist movements and ideologies denied and emerging under some public pressure.

The truth in social aspect is becoming a “pledge of fight”², which should take into account both the rational and the irrational beliefs of everyday consciousness. Criteria for truth and error on a daily basis are floating and sustainable, but do not deny the argumentation. The latter, however, is also a matter of interest. We social agents are more than “variables” or “dimensions”, and besides “brain” and “mind” we also have a “body” with our specific needs.

The homosexuality also opposes traditional value attitudes, relying on the traditional right of sexual human freedom. In this connection, each of the aforementioned movements and the like has its own criterion of authenticity and is formed on the basis of the “rhetorical effect” of their ideologies formed on the basis of social exclusivism. Finding “proof” material and the persuasiveness of similar theories directed at certain social paradigms is also the aspirations of the ideologues of such social movements.

² Bourdieu P., *Practical reason: On the theory of action*. S. 97, p. 78.

Knowledge in the modern world is increasingly individualized, and therefore the significance of feelings and intuition or not the epistemological premise is growing. An old saying reads: “The truth is being discussed coolly, but it is passionately defended”. This is not the case with the language of mathematics, and to illustrate it, we could observe what is happening in a “good court”.

Searching for the true answers is not only a trademark of scientific methods, but also of argumentative expression from the position of everyday consciousness that shapes behavioral patterns. Representing criteria of truth and error is social, not just a scientific and philosophical product, although the latter would have an indirect influence in its formation. “To believe what you see”, or visualization is a conviction that accepts criteria of truth and in a scientific and wider social context of the Western materialistic world-wide system.

However, linguistic rhetoric is different if classical epistemology focuses on the logical relationship between judgments, anthropoepistemology shifts the center to the epistemological effects of socially oriented knowledge, social and cultural patterns and behavioral criteria. The latter are the basis of the social construction of reality.

Anthropoepistemology studies by the character of human epistemological actions in the behavior of social agents. Such will be the task of a social epistemology that will broaden the scope of sociology of knowledge. The syntheses between science and socially active knowledge – behavior in their interaction will be at the heart of the formation of criteria for truth and error at everyday level.

This is a new epistemology that will preserve only one thought skeleton of the previous one by bringing it into the broad social, sociological and even anthropological context, as the sciences are social, they are in fact a product of human activity.

If the traditional understanding of epistemology is mainly related to the science and history of scientific beliefs and philosophy, I think it is inextricably linked to the social construction of the reality of the agents themselves as a given or as an important part of the society in which they give birth, but they interpret and reintegrate into their conscious life. In the end, scholars, philosophers, priests and priests, and intellectuals are an integral part of this society.

Here I have not simply combined and presented systematically in view of my objectives some even radically opposite points of view, but I have attempted to justify the thesis that everything in scientific knowledge is dictated by the fact that people are able to build criteria of truth (non-thinking substances) and ultimately determines their overall social behavior.

The construction and consumption of reality reflects and/or ultimately only reflects on individuals, the scientific and social absorption of the world.

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A Research in Car Design Concept – Citroën DS

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Abstract

The Citroën model “DS 19” did not have the model redesign itself, however it was created as a Brand. The Brand “DS” was inspired by the companies that were strictly concerned with modifying the machines coming directly from the factories by adding them aesthetic in terms of performance. This article is based on the research of Citroën cars, forgotten by many people, where the model “DS 19” will have appearance and proposal of more dynamic, innovative and modern design.

Keywords: Citroën, DS 19, design, innovation, modern design.

1. Introduction

This article derive from my PhD thesis which is the continuation of my passion, the result of my personal concerns in the direction of the car design, in terms of the exterior and interior appearance of the concept car. The way a car is presented is the result of an appropriate design process of a very complex study that includes aspects from very vast fields.

Here, I did not want to highlight some standards by which we must invent something new, something revolutionary, I just followed my heart and intended to do something I think is important and necessary to make a significant contribution. This PhD thesis characterizes me, first of all as a person, but especially as a designer. It reflects the direction that I want to pursue and deepen in the future, by the opportunity of a job in the field of product design, more exactly the field of car design.

The PhD thesis is the continuation of my bachelor and master's degree, my deep involvement in the field of auto design. I chose this theme because this is the direction I want to pursue in the future. I am impressed and inspired by the automotive industry. Many people say that with all today's talents it's very difficult to work in the field, to which I agree. Nobody said it would be easy, I know it's hard to get to work as a designer at a known car company, but not impossible, and that's enough for me, when you work hard and you really want something, you cannot fail.

It's not something that came unexpectedly, it's something that has formed with years, that love for the revolutionary invention that goes on four wheels and ensures the mobility that we have longed for, for so long. I have a strong reason and a great motivation to follow the path of a career in the car industry. It's not just a transport car, it's more than that, and it's a memory that made me discover myself. It's something you wanted when you were a kid, it's like a lifestyle in

which you invested a lot of effort and work to create something that helps people get from point A to point B and enjoy the ride and the shape, dynamics, elegance and comfort that is provided for them during the journey. To design something, not just cars, but other products means motivation and love for drawing. I like to design new things because it's about industry's demands, to be more creative and to invent new, beautiful and more functional things. This work is very important because it is the essence of everything I have learned in these years.

1.1 Sedan-type car

The car is a vehicle with two up to nine seats, including the driver's seat, designed and used for rapid transport of persons and luggage and/or the carriage of goods, or even to tow a trailer. Depending on the body shape, the cars can be: berlin, limousine, coupe and break, or with convertible roof, like the roadster and speeder. All body types are presented by three groups: tri-volume, bi-volume and mono-volume. The tri-volume body type is characterized by separate compartments: for passengers, luggage and the engine. This type refers to the less universal car body because of its transformation possibilities of the passenger compartment and the luggage compartment. This group includes sedan, coupe, cabriolet, roadster, limousine and pick-up.

The sedans that we are going to talk about the most are available in several sizes, ranging from small to medium size. The rear doors are coming in handy for access to the rear seats. The luggage compartment is the safest way to store luggage or cargo. The car's body tends to be lowered for better aerodynamics and relatively lightweight, which helps minimizing the fuel consumption. This body type is the most widespread among vehicles. At the sedan, the rear seat does not rise, it is fixed, rigid on the frame, although the backrest can be left down when transporting large objects. Sedan is the most common type of bodywork among cars. The word "Sedan" is an English word and it came from the fact that the first luxury car with these features was developed in the city of Sedan, France. It is noteworthy that, for the same car body style, the French are using the synonym "berlin", a word of German origin. Berlin is also considered the first European city where such a transport was developed.

2. Method – Methodology applied in research

The methodology applied in the research begins with the assessment of the bachelor's degree theme where, for the first time, I have started my professional car design research, more precisely the SUV type design. After completing the first three years of college, I have enrolled for two more years of Masters where I continued on the field of cars but this time with more experience. I tried to study other types of cars, and in the dissertation thesis I found the Minivan type cars. On that point I have already started to strictly research only the iconic cars or which impacted a given period. All the work was based on the research of old-timer cars and their influence on the market.

As an applied method, I used books that were in the field of car design such as: H-point, Design Sketching, Presentation Techniques, and Sketching Drawing Techniques. I spoke with Oliver from Car Design Archives who helped me a lot with information about the meaning of Citroën in France and information from specialized websites, such as: www.cardesign.ru, www.carbodydesign.com, and www.cardesignnews.com. On these sites I was able to find information that came from the heads of the design departments, where they explained their approach to the whole process of creating the ideal cars for consumers. This has helped me a lot on the documenting side when we were starting out on the creation plan to which point we are asking ourselves a lot of questions. The first phase starts with planning the products and then the process begins with research and gathering information about markets, competitors and customers. For all these questions we need to find an answer and a solution, therefore the basic

principles and key elements of the design process remain the same, developing the process with a purpose, with a logical process. All of these together with the study of technology allows the strategy of product development.

2.1 DS created as a brand

Officially created on June 1, 2014, the “DS” has become a self-brand and has stated its ambition to be incorporated into the luxury French car industry. The French brand is built on an exceptional heritage, this legendary car transmits the values of innovation, excellence and avant-garde. “Today we are able to create a DS brand simply because of the inspiration from the incredible legacy of the classic DS model. The legendary car is a symbol of values such as innovation, superior quality and avant-garde, which are our work”¹, said DS brand leader. “We look forward to continuing the stories and ensuring that these rumors continue to integrate French expertise into luxury cars many years ahead of us”².

As a principle of changing the components in stock, DS was and is based on both aesthetic and functional changes. As an example in comparison, we can use the C4 and DS4 models.



Picture 1. The Citroën model C4 and DS4.

<https://www.carwow.co.uk/blog/citroen-ds3-vs-ds4-0387>.

From Top Gear the world’s greatest car website, who are behind all car reviews tells us how the story has changed when Citroën has confirmed that the DS brand will be separated, which means that the future DS models on the European market will not have any Citroën badge. According to the company, Citroën will be a more affordable and practical car, while DS cars will have a special style, sophisticated equipment and a luxuriously designed interior. So every model in the DS range shares some mechanical components with other Citroën models, each version being unique.

Citroën’s people stated for the Telegraph that for the future, the cars of both brands will be sold by the same dealers, but they did not rule out the idea that the DS models will be sold in separate showrooms. If sales go well, the company may consider an additional internal reorganization to support the new brand. In order to move further upmarket, DS have currently some models include the DS3. This model it’s a stylish supermini, competing against the Mini and Fiat 500, the DS4 that can be considered the closest rival for Audi A3 and last, the DS5 which is a

¹ Car Design Archives. The DS brand leader. Retrieved 10 October 2018. www.vrelegume.rs.

² *Ibid.*

quirky take on the compact executive class. How safe or rather how reliable are DS cars? Well from The Telegraph were pretty scathing when they were making review on the DS4 model in 2016, calling it the “worst car on sale”, however, one of its few shots of redemption was its reliability, with The Telegraph scoring it 7/7 on this front. However, no significant issues have been widely reported with any DS models. All we need it to do is step inside in some DS model especially the latest DS5 to see that the materials it’s of a high quality and everything feels solid and built to last. The fundamental question is whether the tech underneath holds out.

“Consumer surveys are meant to be a pretty accurate way of determining how reliable a car is. They ask those that are driving the models to rank their car for reliability. This means you get quite a good view of what the people who drive the car every day think of its dependability – in theory, at least”³.

In 2015, the brand celebrated 60 year of the original DS model at the famous Geneva Motor Show, revealed its signature “DS AUTOMOBILES, SPIRIT OF AVANT-GARDE”. The DS cars of today will be combine of remarkable style and technology for exterior design, noble materials and sophistication will complete interior with comfort and energy, as the last decision for the separation was the premiere of the Divine DS concept, which does not contain any Citroën badges and was the first indication that European market models could lose the Citroën brand they currently own. The Divine DS made its public debut at the Paris Motor Show.



Picture 2. The Citroën model Divine DS.

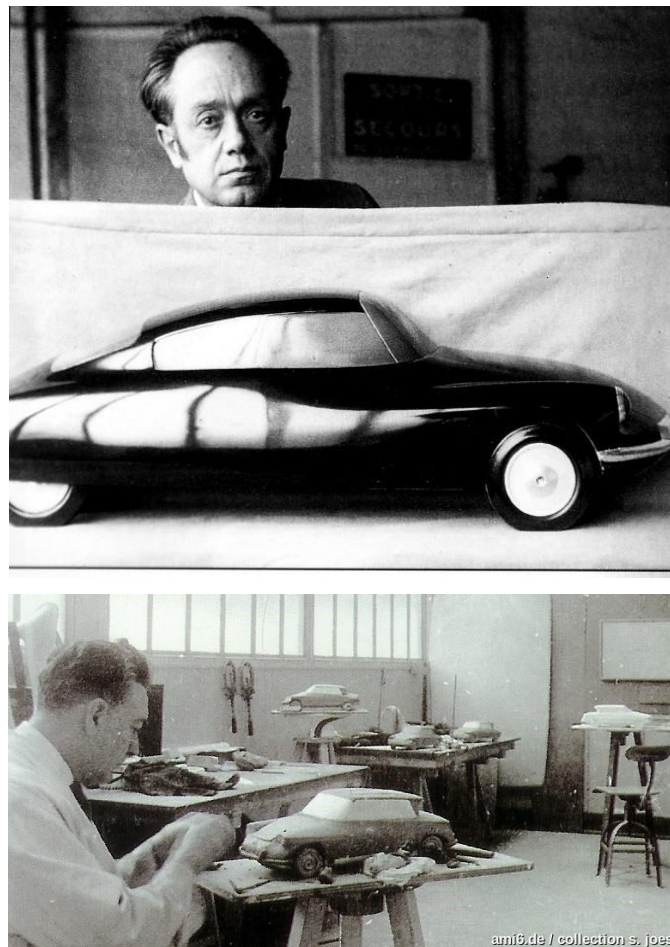
<https://www.topgear.com/car-news/paris-motor-show/citroens-bonkers-new-divine-ds>

³ OSV supplies all makes and models of cars and vans, using every funding method imaginable, which means that we don’t just sell vehicles, we fulfil every customer’s needs. Retrieved 17 October 2018. www.osv.ltd.uk.

3. Results

The DS was a breakthrough model, technically and stylistically. Its acceptance was initially hard by the French public in 1955 because it was too much disruptive. In his book, Raymond Loewy talks about the MAYA concept: Most Advanced Yet Acceptable. So the DS was beyond this line. Keep in mind this model was not designed but sculpted. That means many things. I read public find the front and the rear too much different and it took years to the public to accept this model.

The designer of this car is Flaminio Bertoni, Italian sculptor and designer, who greatly contributes to the creation of the “Shark”. Bertoni was one of the most innovative designers in the automotive industry, he was a car designer, a career that resembled sculpture. Therefore, it cannot be a surprise that Flaminio was an art lover who admired the work of Michelangelo and Leonardo da Vinci. Because this was a sculpture, it became a symbol of post-modernism. Flaminio Bertoni was one of the most innovative designers of the automotive industry, he was born in the city of Varese, Italy, better known and appreciated in France. He designed some of the most beautiful and iconic Citroën models. In fact, many of the Citroën models that he has designed have become classical cults. In 1932, Citroën hired him because of his invention, namely a hydro-pneumatic suspension system front-wheel drive such as “Traction Avant”.



Picture 3. From Flaminio Bertone's atelier

<http://www.designindex.org/designers/design/flaminio-bertoni.html>

3.1 Results – What kind of influence has the Citroen DS left for the automotive industry?

On the first day of the 1955 Paris Motor Show, 12,000 models were ordered. Due to orders that exceed the capabilities of Citroen's factories, in the coming months many customers waited a while before the DS arrived in their garage. In many revolutionary models, people have not seen that model as the possible car of the future, with the coming of “DS”, the future was a reality and was ahead of them. Prior to the Second World War, Citroen was Europe's largest automaker, it was a golden age of the French brand, which at that time had a tendency of originality and innovation in relation to the competition. The DS model was something France needed in the renewal of the country after the end of the Second World War. The “Shark” has become a symbol of the French genius, which has been sold in several markets around the world. The French structuralist Roland Barthes wrote about DS and he said that it was “fallen from the sky”, however they couldn't call it avant-garde because nobody, not even from Citroën, followed in the DS's conceptual path. Citroën built and sold about 1.5 million cars, the DS remains a kind of that one-and-done, design-wise. In a 2009 poll of top automotive designers, *Classic & Sports Car* magazine declared the DS “The Most Beautiful Car of All Time.”



Picture 4. The first day of the 1955 Paris Motor Show

<https://www.wsj.com/articles/the-citroen-ds-19-why-its-the-ultimate-classic-car>

In addition, Citroën dealers were reluctant to accept - they did not receive training to repair them. Below is a picture of the factory where people work on the DS model that initially had three times the number of orders than what they were able to produce.



Picture 5. The factory where people work on the DS model
<http://www.magazinauto.com/jubileji-60-godina-citroena-ds/>

The DS remained popular and competitive throughout the years of production run. Its peak production was in 1970, when certain design elements like the somewhat narrow cabin, column-mounted gearstick and separate fenders began to seem a little old-fashioned in the 1970s. Some time we are using study of vision-of-concept design for bright elements, the likeness of the car with the human body or various elements such: the senses, the face, the eyes, the backs. In versions such as the model “Palas” and “Prestige”, the exclusivity was an inner pair of lights that followed a steering wheel, which helped the headlights better illuminate the curves of road. However, the DS model was not the first car that had headlights that followed the curve, before it was the Czech model “Tatra 77A”.

3.2 How it may have influenced politically?

Well, that's a good question. Like the Cruiser “France”, the Concorde, the DS was a showcase for the French Industries and the Foreign Minister. Of course, the myth was reinforced thanks to the General De Gaulle but not only. In my opinion, popular movies like *Phantoms* helped to build the legend in the collective imaginary. The French Intelligentsia also applause thanks to the Roland Barthes's book “*Mythologies*” where he compares the DS to a modern cathedral. The cult of a consumer product. That's exactly what wanted catch Citroën when they transform the legend into a brand.

To replay precisely on this question we need to think about what would happen: imagine the attack of the Petit-Clamard in 1962 if De Gaulle didn't ran a DS and died? The political consequences would be huge (the NATO, the ECC...).

As the years passed, a Cabriolet model was also presented, but it was designed especially for movies, presidents, queens and kings. A more special model, which thanks to Citroën's hydro-pneumatic suspension, in 1962 came under machine-gun fire, despite punctures, the clever suspension kept the car steady, allowing a full-speed escape with two tires shot after the French general's attempt to assassinate De Gaulle, managed to keep them safe. A total of 150

bullets were fired at the car, twenty bullets had hit, several had hit the wheels and others had crossed the car where some at the height the heads of General de Gaulle and his wife Yvonne who had miraculously survived this attack. Also in 1962, the “Shark” received its first recollection. Headlights remain round as in the first series but the front of the car is optimized more aerodynamically. “The ingenious hydro-pneumatic suspension system endowed it with wonderful ride quality, and other advanced features such as headlights that turned in unison with the steering still inspires automotive safety technology to this day. Above all else, it looked stunning too”⁴.



Picture 6. Cabriolet model was also presented with General De Gaulle.

<http://www.magazinauto.com/jubileji-60-godina-citroena-ds/>

4. Discussion – Personal project

My PhD thesis theme will be: Evolution and Aesthetic Perspectives of the Car, Fundamental Concepts in Interior and Exterior Design. By researching the cars forgotten by many people, remembering today's world that all started with the post-war period when this type of car appeared. Here we come with a new line that gives it a more dynamic, attractive and sporty appearance from the outside. The interior that brings an innovative design proposal, the warmth of interior design and the most important comfort that gives people pleasure. A challenge for me where my vision comes to expression. The challenge will be and will have the role of artistic creation, the clear, interdisciplinary context where the originality of the theme matters, the key terms that made us think and made us chose that direction. In the research that I propose, I enumerate the following issues: Car History, The Evolution (key moments), The Appearance, Automotive Types, The Aesthetic Segments, Case Studies (special Cars), Designers of the Most Renowned Cars, Current Situation (Contemporary Paradigms in Auto Design), Powerful Engine Perspectives, Combination Trends (Land + Air, Flying Cars), Design Creation: Automotive

⁴ Top Gear car website, who are behind all car reviews. Retrieved 5 October 2018. www.topgear.com.

Classes, Market Segments, The Aesthetics, The Ergonomics, The Technologies and The Personal Project.

All of these in the vast majority will be respected following the research process. The finality of the current PhD thesis will be presented through a project that will illustrate the personal creation of a sedan type car's body plus interior design, the beginning of the concept of creation and his approach to the final product, which includes sketches, Photoshop rendering, 3d design, product layout with scale of 1:100 and in the end the final presentation of the project through drawings and mock-up.

Why I choose the Citroën DS model better known as the “Shark”. The DS pronounced Déesse, a pun on the French word for “goddess”. All the meaning of this project is based on the “revival of the goddess”. The old model will have a redesign, I have to study very carefully the small details that I will implement on the new model. Critics say that today's cars lack the DS elegance. Here we have a car that has marked a period of the automotive industry, and yet no one's talking anymore about this model. The Ds has become a brand which one day might write history, but where is now the original DS 19 model from 1955? The DS is still a young brand that has not much experience featured in any legit customer pleasure and satisfaction surveys yet, in time they will eventually evolve in good company that is able to pass through hard and as a manufacturer that solves the unreliability issue. For now there are not enough DS owners participating, but I'm sure that this will not stop them to prove themselves on the market.

Because of this, every car should be a special story, not just something that came overnight. This gives me the motive and confidence to continue the DS story and create something completely different, something that justifies the name and meaning of DS. In a nutshell, if you want an innovative product, you need to prepare the public to force their acceptance. That's exactly the job of the concept cars designers are.



Picture 7. The Citroën 19 model from 1955.

<http://www.magazinauto.com/jubileji-60-godina-citroena-ds/>

4.1 Studies of creative design process

Creating a concept from the beginning on a white sheet of paper can be very difficult for many designers. However, even if each project will vary, the basic principles and the key elements of the design process remain the same. The first phase by which we start with the product planning, the process begins with research and informs about markets, competitors and customers, where we start with the study of other people's opinions which leads to a possible user. Also it begins with the study of technology that allows product development strategy. The functionality of the product together with the innovation fight against the already existing products on the market. Once we have reached the final shape, we are going through product engineering, building the prototype to be tested. At the beginning of the design process, it is necessary to determine in which segment the concept to be designed is addressed. The market segment of a vehicle type is often determined before the project is started, helping the design to focus in a certain direction.

On the Creative and Design Plan the strong point is innovation. From the visual design concept of a design product, to 3D design, presenting and selling means a long way which has to be respected with patience and professionalism. The innovative product offering full production services must be able to respond quickly to customer needs through new technologies, aesthetics and ergonomics. Advertising works separately from design, and it has sales specialists that must always work to draw the customer's attention to innovative ideas, creativity and to the most important "details". Starting from generic ideas, the team of designers or the individual develops to meet the needs of customers, but first of all, customers need to be listened to, in order for the execution of design projects to meet the satisfaction level. To be successful, the designer needs a lot of experience in production and especially in serial production.

In a journal publication I read: Optimization of assembly technologies in the automotive industry, written by Negrus Andrei Mihai, the fact about how it's very important the automotive industry for humanity. And proof that is one of the top five most important industries in the world, affecting not only the economy but also the world's culture. It provides jobs for millions of people, generating the basis for a multitude of services. Automobiles revolutionized the 20th and 21st centuries, changing forever the way people live. The car has allowed the transport of materials further, faster and has opened up a large market for business and commerce. The car industry has reduced the total cost of transport using methods such as large series production, mass sale and globalization of production. Automobile manufacturers are the world's largest companies. These corporations are often multifunctional, having branches and factories in different countries. These companies distribute parts, use components produced in other countries, or assemble cars in other foreign countries. The three major automotive companies in the United States: General Motors Corporation, Ford Motor Company and Chrysler assure most jobs, but the entry of foreign companies (Toyota Motor Corporation and Nissan Motor Corporation) has also contributed to the emergence many opportunities for development and innovation. This text was helped and inspired me a lot and give me that motive why to continue my research on the automotive industry.

5. Conclusions

When introducing an innovative concept, consumers first try to classify the product. In other words, an innovation can only be rejected because consumers bind it, in some way, to an existing category that has a negative connotation (meaning). If consumers cannot classify the product, then they use a trial based on certain evaluation criteria. Based on the data collected in a research study, some cognitive processes have been reached, which then influence the evaluation process when the evaluation criteria has to be formed.

Consumers may encounter difficulties when faced with an extremely innovative concept in forming their own assessment criteria. This is an analysis based more on the process of individual thinking and classification, to which I also agree. The manufacturer, when confronted with an innovative concept, does not rely on market preferences but on educating the consumer through the principle of evolution, innovation. This is a very good thinking to develop the relationship between producer and consumer.

In the research of “Creativity in uncovering customer expertise for affective design” was analyzed customer expertise in purchasing a car that satisfies customer needs for affective design. The approach was based on a hierarchical patterns analysis starting with simple marketing requirements. “We assume that there is a rationale for customer’s evaluation of cars, and that evaluations are connected to design details. The purpose of using a hierarchical pattern was to model how car buyers evaluate car appearance. In addition, a hierarchical pattern is helpful to establish a dialog between car buyers and designers and create a frame work, where customer requirements can be satisfied”⁵. The study had five main roles of product appearance like the: Aesthetics, Symbolic Meaning, Functionality, Ergonomics and Categorization. The functional and ergonomics role are described more than just semantic roles as they address user’s evaluation of the apparent utility and perceived quality of a design.

There are many sites on the web pages that give us all kinds of answers and information, this does not mean that they are not accurate and that they are just fictions for good marketing but it’s certainly better when you talk directly to a person from the area you are researching. I managed to talk to someone who was familiar with the current situation with French car brands, someone who can give me the right information. They say about the DS brand where they are quite sure it will become a study case in marketing schools as counter-examples, their strategy was pathetic. DS brand was inspired by the companies that were strictly mindful of modifying the machines coming directly from the factories adding an aesthetic plus in terms of performances. Simple examples would be: Abarth for Fiat and Alfa Romeo, Hamann for BMW (makes parts for BMW only), Ghia for Ford. When John Z DeLorean built his own marque DMC, he knew the first model should be a sports car to build quickly a strong image and reputation for his brand. Initially, DMC should have been a generalist car maker, exactly the same recipe was used by Tesla.

After the discussions we had with Oliver from France he gave me a few good and bad ideas, why should I get more to rely on Citroën because, after all, DS was created by them. He said: “Instead of this, the first DS model was badged Citroën (DS was considered at that time as a new division) and was the small model DS3. For the audience, it was really confusing and the model was not enough powerful to install its legitimacy. In addition, the name DS is very heavy and the public have for sure some expectations related to the DNA of the original DS model. Not a marketing scam. Lastly, I think the name DS was a wrong choice. It’s very dangerous to transform a model to a marque. The name Pallas (which was used on the premium models of DS, GS and CX) was more widely preferable. The link with the past was intact and avoid to “ransack” a legacy”. As a conclusion DS is not a bad story, but it takes time to develop and people to accept it as a company that independently produces good and quality cars.

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⁵ Bagnara, S., Tartaglia, R., Albolino, S., Alexander, T., & Fujita, Y. (2018). *Book series. Creativity in uncovering customer expertise for affective design*. Springer Verlag Switzerland AG.

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Religion and Universal Values

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Abstract

This article analyzes the interrelation between religion and universal values. There is questioning the existence of such values generally. In addition, it is analyzed the claim of religions that they are standing behind such values and historical facts in this regard.

Keywords: universal values, religion.

The main argument of the apologists of religiosity is that it provided high morality. An undeniably statistical way proves that belief in God has little to do with the level of morality in a society. There are many more important factors to observe the universal moral norms – not to kill, not to steal, commit adultery, and so on. For example, employment, whether you are dressed and fed, whether you feel happy. We can compare two public periods in this respect.

In the first, the “socialist”, when the majority of population did not believe in gods, there were fewer crimes, more humanity and respect among the people. It turned out that through the “criminal”, atheistic communist ideology, no less humane people were formed than by religious morality. In the second, transition period, when the majority of the nation (if we believe in the last census, 70 percent of the nation is identified with some religion) is believed or say that is believed, we have a multiplicity of crime, a multiplicity of disrespect for the property and life of the other. Another proof of the higher morality before is the much widespread anti-war mood among the “socialist” generations, compared to the current increase in the tolerance of Bulgarians, including young Bulgarians, to the war and the participation of Bulgaria in various military missions, although decorated with human phraseology.

From the point of view of morality, one can say otherwise. Prior to the development of capitalism, when the level of education was low and religiosity was ubiquitous, the elite itself was more sincere believers and afraid of God’s punishment. His religiosity has in some cases been deterred by some inhumane action. Today’s elite in industrialized countries like Bulgaria is a much more faithless believer in God. The fear of God, God’s punishment, in minimal degree determine his behavior. And the claims of religiosity are great. Hypocrisy and demagoguery are staggering.

The question of how morally the church is still to be opposed to medical research that can save lives – for example, through the use of stem cells – can be raised. Or how moral is the Catholic Church to prohibit abortion, even when there is a risk to the woman.

It seems to me interesting to ask other important questions, which are not very much discussed in the public domain.

First of all, are there any universal moral values?

In my opinion, it is very difficult to say this. Rather, we need to talk about the social-group nature of morality. The morale of the employer is not the same as that of the worker. It is moral for the capitalist not to pay the salaries of his workers every month, to pay no social security contributions, to dismiss without notice, and so on. I doubt, however, that this is qualified as moral by the workers who are everyday victims of this behavior.

For those involved in the skinheads, it is moral to beat and kill gypsies, for such as me – it is not. For lazy workers and employees it is moral not to work fully, and for the hardworking and the responsible – it is not. For the murderers it is morally to kill, for the thieves – to steal. For the rest, it is immoral. For harmful food-producing people this is not immoral, but it is hard to say that for their victims.

What are the “universal values” that protect religion, not only the Bible and the Qur'an, but mostly in the living, the historical practice of the Christian and the other religions.

What is the attitude of religion to the most important of supposedly universal values “Do not kill!”

It can be traced, for example, through the attitude of religion and church to wars. Depending on the interests of the respective ruling elite and the economic interests of the churches themselves, this attitude is different. It would be great to be able to say that religion everywhere pushes for peace. Unfortunately, this is not the case. It is very likely that religion in the modern world is increasingly inciting wars, both between and within nations. Religious institutions and movements blow up battles and civil wars on the Indian subcontinent, the Balkans, the Middle East, and Africa.

The history of Christianity is full of examples of justification and participation of the church in various wars. But there are occasions when the church has helped to pacify the political environment.

Nowadays, in the case of Islamic fundamentalism, it is about promoting the militant attitudes among peoples and relevant national policies. But Christian fundamentalism also forms belligerent values among European nations. And this serves to support the aggressions of their governments around the world. It leads to the justification and justification of the murders of different categories of people sometimes on a large scale.

The Christian church has led crusades, has justified the invasion of Europeans in Latin America, Asia and Africa. She has participated in the genocide against the local population in the countries concerned – against the Negroes, Indians and so on. The Catholic Church, the Vatican, has actively contributed to the extermination of hundreds of thousands of Jews during the Second World War as allies of Hitler, and they have been behind the deaths of thousands of pregnant women.

If we look at the Bible, in fact, according to modern criteria, God is the perpetrator of the most terrible forms of genocide – he destroys, for example, all mankind, leaving only Noah's family. For the sins of several souls, it burns down two whole cities like Sodom and Gomorrah – something that every court today would condemn the perpetrator as an individual guilty of a monstrous act. Different interpretations and justifications of violence essentially play the role of ideologies that legitimize the violence of certain entities and in certain forms and reject the violence of other entities in other forms. In this logic, religious people tend to accept divine violence as justifiable and at the same time not to accept other types of violence, which also have their reasons.

The Inquisition has killed after violent torture thousands of people. The combination of methods of torture and killing, the instruments used are worthy of wonder for the

fantasy and orderliness of this activity. They have even been counted with the sex of torture. For example, there are some great scissors for cutting a female breast. In the pursuit of witches and heretics, the slander has been brought to the rank of most godly deed. And the grief of the long and cruelly murdered people has been the occasion and centerpiece of a cheerful party. It was supposed to bring joy to many moral believers – snitters. All-day auto-dafes was accompanied by joy, drinking and eating.

Theologian Hans Küng (2003) argues that in the negative, in the destruction, the religions have achieved infinitely many and constantly achieve it. So many disputes, bloody conflicts, and “religious wars” are recorded at their expense; so many economic-political-military conflicts are partly provoked, partly marked, inspired and legitimized – as is the case for both world wars.

The bloody change of the Catholic into a Protestant identity among the Irish during the British bourgeois revolution is in many ways more terrible than the Islamization of the Christian population in the Balkans. The best lands are given to the English, and the Irish are driven to the barren areas. This is a prerequisite for the frequent cases of mass starvation and the death of millions of people because the land is appropriated by outside conquerors and the bulk of food is exported to England for great profits. At the end of the nineteenth century, the population of Ireland declined twice – from 8 to 4 million, the percentage of emigrants was unprecedented.

Nowadays, the head of the self-proclaimed Ukrainian Orthodox Church of Kiev Patriarchate Filaret allows the faithful Ukrainians to kill the Southeast residents who disagree with the revolutionary changes in Kiev and the nationalist course of the new power. In its treatment such killings are not murders and are not a violation of Christian commandments, but a mission to protect the homeland.

Many mass murders and wars not only in the Middle East between Maronite Christians, Sunni and Shiite Muslims, Syrians, Palestinians, Druze and Israelis, but also between Iran and Iraq, between Indians and Pakistanis, Hindus and Sikhs, Sinhali Buddhists and Tamil Hindus, and even before, between the Buddhist monks and the Catholic regime in Vietnam but still today among Catholics and Protestants in Northern Ireland, have been or are indescribably fanatical, bloody and ruthless because they have a religious foundation.

The promise to the kamikaze about heavenly life that awaits him after the terrorist act is a great stimulus to crime, to murder? A great incentive for new crimes is the mechanism of confession. The priest, that is the church, becomes an enviable database of the most intimate nature of every Catholic, including criminals. At the same time, the priest has the duty not to disseminate information about crimes to the authorities of the state. He should only be content with a moral sermon. This mechanism is conceived as a direct impediment to state repression against crime and the possibility of an individual, subjective, volatile attitude towards the crime by priests. Depending on their interests and understandings, the interests of their church and the elite they actually distribute or hide the information.

In other words, it can hardly be said that the Christian church during the centuries was particularly concerned about the observance of the supreme commandment of God – “Do not kill”! On the contrary, it has helped to kill too many people. In Islamic theory, the right to life is considered sacred as well as the right to property, privacy. But there are a myriad of cases where forces led by this religion have ignored these messages and the rights of the person. And they have emphasized other Islamic values related to jihad and murder. Still today in the Facebook can be seen killing women with stones.

If we turn to the practice of the sects – there are the same – under the influence of masterful manipulation – mass thefts, murders and suicides inspired.

At the same time, religions can achieve and accomplish many things in a positive way. Through individuals, religious groups, or through the entire religious community, religions can consistently advocate for peace, denial of power, and love for neighbors in the world. They can propagate and trigger basic behaviors reasons such as peace of mind and tolerance.

The same can be said of the observance of the order “Do not steal!” One of the purposes of the Inquisition was, in fact, the proclamation of a person as a heretic, a witch, and so on to take possession of the property in order to enrich the church. The aggressive wars involving religion and the church have led to plundering the riches of many peoples. An Islamic state is connected with the acquisition of great wealth through the theft of monuments of culture, oil, money as a means of redemption of stolen people, transit fees, etc. such activities to enrich certain people. Indicative is the attitude of IDAL (Chukov, 2016) to Christians in the respective territories. Initially, IDI leadership puts an “ultimatum on local Christians – to accept Islam, or to be executed or expelled from the country”. It is later felt that it would be more practical from an economic point of view to force them to pay special taxes to new rulers. And they change the tactics.

In today’s Bulgaria, as well as in other former “socialist” countries, the greatest thieves who have illegally redistribute so-called public ownership now stands the most vocal behind the religious values – both Christian and Muslim. They are baptized for 40-50 years.

The same can be said about keeping the order “Do not commit adultery”! Catholic priests are traditionally examples of adultery and pedophilia. Because the Catholic Church so much “cares” for satisfying the natural needs of its priests, depriving them of the opportunity to satisfy their needs in a legitimate, natural way. He just pushes them in the arms of the devil. And the goal is not moral, but economic – not to scatter church wealth. But with this inhumane activity, it promotes the development of cinema production – on this theme there are wonderful films of the sort of *Convicted souls*, *Birds die alone*, and others.

The church has always closed its eyes to male adulteries, especially to the more elevated ones, and has been particularly cruel to female adultery. Even today, in the Muslim world, not the rapists are often punished, but the raped women. They kill them in the square even today with stones. It is no accident that such girls and women also enter the paws of terrorists to wash their sin through godly terrorist activity. In short – selective, hypocritical, inconsistent behavior in defense of this alleged universal value.

Or what we have to say about the notorious humility as a fundamental value of Christianity? What humility is it about?

Naturally it is talked about for the humiliation of the more disadvantaged layers. To those who if do not have, they must be humble and not envious of the possessors, and when they are unhappy, not to rebel, but to go to pray to God for help.

It would be nice to be more humble on other occasions. Maybe we should be humble when the terrorists attack us and perhaps we must trace it as God’s anger for our sins. But Christian fundamentalists do not. Maybe we should be more humble when we go around the world and bring with us problems to other peoples. And then they return it to us in the form of terrorism and fundamentalism.

Does the Christian Church teach us to be humility in our consumer psychology with which we destroy the branch on which we sit – our mother Earth? Does it learn us to solve the problems of ecology through humility and respect for it? I have not felt such a moment. On the contrary, the Catholic Church continues to parade with its gold and riches, the expensive vestments of popes and cardinals, and so on. And he does not point to those who destroy nature and live in unnecessary luxury at the expense of those who have nothing to eat.

Churches are usually very masterfully able to bring humility to those who should not be humble, but they can't seduce others who have to set an example of humility with their behavior. Where was, for example, the humility of Ecumenical Patriarch Bartholomew at the moment when he discovered her monument in Greece himself? Apparently his humbleness was on annual leave.

Humility as a value is used and educated only for certain classes and for certain occasions – selective. Then what value is it – all-human, social-group, religious or any other?

Perhaps the least critical I can be about the value of “Respect your parents and love your children”. Perhaps this is the only most important value behind which the underlying religions, including the Christian one, stand more consistently and firmly. Although here can be found facts that do not talk much about the concern of the Christian religion, for example, about the elderly, about our parents. The Bulgarian Church does not do much to teach children to respect their parents at this times, it has not been particularly concerned about the bereaved old men, the raped grandmothers.

What can be said about “gender equality” as a core Western value. Some of the worst words about Muslim religion today are heading along this line. That he does not raise respect for the woman.

On the occasion of the terrorist acts in France, some of our great “democrats” said that Muslims treated their wives as animals. I, as an emancipated woman, should be excited about their concern for women. But I rather get sick because that is not true and it distorts the Muslim religion and the relationship between Muslims from the point of Christian fundamentalism.

In some books on the situation of women in the 14th-17th centuries, it is proved with many facts that the Muslim woman lived much better than the Christian. And today there are millions of Muslim women who live happily, respected and loved by their husbands, though not with the same rights as them, and even more so than us – today's emancipated Western women. There are cases where they treat cruelly and repressively with a part of their women, but this can be compared, for example, with the attitude of the Inquisition to the witches, the Catholic Church to the pregnant women of rape and to which is forbidden to make abortion, to many Christians who oppress their wives in a variety of ways nowadays. Men, and perhaps many of them Christians, are the ones behind the trafficking of women in the Western world, of prostitution. And all this, as is known, is associated with a very “humane” attitude towards the women concerned, with very “little” violence.

Here are some statistics about daily domestic violence by ordinary Bulgarian men, some of whom are probably claiming to be Christians. In Plovdiv, 238 cases of domestic violence are filed in 2014, and 630 in Sofia. From the beginning to the middle of 2015 in Plovdiv the cases are 193, in Varna – 209 and in Burgas – 12,210. As you have given that women who bring cases are a very small percentage of all women who are abused at home. The violence of children and grandchildren grows on their parents, grandparents. And I have not heard from the media that the church has been involved in the matter. At the same time, when the same media gives us information about miraculous icons that can cure us of important illnesses in a day or two. At the same time, when they organize prayers to protect us from the crashes on the streets.

John Stewart Mill (2012) admits that men really have given themselves the right to discriminate against women, to dominate them. But as a smart man and a scientist he says the following: Men are reason enough not to use their rights fully. As smart drivers do not automatically use their privileges on the road, they look first. Most of the men tend to have a good relationship with their wives, otherwise their lives on the ground would be real hell. This applies to both Christians and Muslims.

So such statements only pour oil into the fire of Christian fundamentalism, which is no better than Islamic, and is becoming more and more harmful – both for women, for men, for Christians, and for Muslims.

It is good to ask ourselves another important question – are people more faithful than those who are not believers?

Since democracy has come, we have begun to desecularize society again and talk about the way that unbelieving people are less spiritual. Even a minister of education has allowed such statements. The facts speak of a lack of direct connection between spirituality (in fact, what is it?), between religiosity and morality.

Even theologians, such as Hans Küng (2003), argue that it can't empirically deny that non-religious people without religion have a basic ethical orientation and lead a moral life. That historically those who have not been religiously believing find new meaning for the human dignity, and overlap more than religiously bound to publicity, freedom of conscience, religious freedom, and other human rights. It can't be argued that many non-religious people have developed and have basic goals and priorities, values and norms, ideals and models, and criteria for true and wrong.

If we use the crime rate as a criterion for measuring the degree of morality of a society, what can we establish? Today, crimes are many times more than the time that we denied and which was characterized by a much lesser degree of faith in God.

As I said above the degree of criminality of the Bulgarian people during the transition has increased very much, as its belief in God has increased. If we are not careful, we can make the wrong conclusion that there is a right proportionality between the degree of religiosity and the degree of crime. I do not want to do this because it will not match the truth. Increasing the religiosity as well as crime are different ways people to react to the deteriorating conditions of their lives. But in any case it can be argued that religiosity does not actually hinder crime at all, the immoral behavior, the trampling of the so-called “universal human values”.

In general, the main religions are selectively and predominantly negative for the protection of human rights. They have stood and stand behind the inequality, the discrimination of women, homosexuals and other categories of people. They are enemies of democracy because they support the God-elect who are born to rule. They embrace democratic principles only insofar as they can't fail to do so, but generally contradict their basic postulates.

Religions are opposed to the right to choose, to freedom. They interfere directly and harshly with the most intimate human thoughts and actions – for example, sexual ones. In the ancient world, sexual desires and behaviors were not qualified as sin and flourished. They were regarded not only as sedition, but as a means of uniting the community.

The Christian religion has a serious antipathy toward sexual pleasure, especially Catholic religion. She has persecuted people for their sexual pleasures. More women than men, more poor than rich. Lutherans and Presbyterians are the toughest to sex.

The woman is perceived as a devilish temptation for the man (in the image of Eve). Sex is allowed only for reproduction, but not for pleasure. It is recommended days for this, clothes to cover the body. Masturbation is a sin. Homosexuality, too. The only allowed posture is the man on the woman. Cruelly punishes the woman's infertility. The very desire for sex is considered a sin. Judaism is also rigorous to sexual pleasures and stimulates abstinence.

Islam encourages man's polygamy, but prohibits homosexuality and sodomy. Woman is a source of pleasure and must obey the man. Cruelly punishes the woman's infertility. Oral and anal sex, love during the woman's monthly cycle is forbidden. The wife can't refuse to her husband sex.

In Buddhism, sexual pleasure is perceived as a value and way of improving spouses' relations. There is a cult of the phallus. Tantrism approves sex – one does not have to fight against his body, against his nature, i.e. against yourself. Sex is an art. There are no European standards of decency and shyness.

These sexual norms in the respective countries where the respective religions dominate are also supported by political means. Some of them are enshrined as state norms, while others are secured by religious means, and state regulations do not have to be made.

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The Importance of Visual Education in E-learning

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Abstract

In the rapidly changing learning landscape of modern globalization emerging distance learning technologies constitute valuable innovative educational methods that create new possibilities for learning and knowledge. A key feature of the material is the visual representation of information both in print and digital form. The resolution of an image is constructed by (re-) composing the multiple parameters affecting communication. The image is the message in the process. Our motivation for investigating the dynamics of visual culture in relation to the educational material used within e-learning springs from: (a) the specific nature of the information that represents the educational material that is organized and applied in the context of distance learning, and (b) the absence of visual culture in almost all levels of education, which is full of visual representations both in print and digital forms. The structure of the paper develops around two thematic pillars: (a) presenting criteria that examine the appropriateness of visual material of MOOC courses, (b) examination (through bibliographical review) of key visual elements and techniques necessary for the acquisition of skills and the development of visual intelligence through the subject of “History of Art”. In all cases of visual stimuli and all levels of visual intelligence, meaning exists not only in individual representational data and symbolic and verbal material but also in the composing forces coexisting with the actual visual description.

Keywords: e-learning, visual education, visual culture, visual communication.

1. Introduction

Since antiquity, there has been much negotiation on the issue of the correlation between vision and critical perception. Heraclitus (2001) argues that “barbarian souls” cannot correctly interpret the senses: “Eyes and ears are bad witnesses for man if he has a soul that does not understand their language”. The controversy between reason and perception of the senses seems so in Democritus (Taylor, 1999) who separated the “dark” knowledge acquired via the senses from the “bright” genuine knowledge in its logical form, as well as from Plato (1969) who, through the cave parable in *The Republic*, emphasizes the misconception of reality through direct vision. Aristotle (1987) is the first who revalues in his *De Anima* the significance of sense perception and experience for the acquisition of knowledge (“without images, the psyche cannot think”) implying that any empirical zetesis, and in our days any empirical research, starts inescapably from experience (Arnheim, 2004).

In modern times, under the giant leap of new technologies, people are quickly adapting to the demands for new products, especially those that reproduce the information visually. Human beings, from a very young age, come into contact with the magical image of the TV, the computer screen and the various ultramodern portable games as well as the smart mobile phones. Contact is an integral part of the everyday life of modern children living in the so called western developed countries to such an extent that they are referred to as the “digital screen” generation. They spend many hours in front of various “screens”, which influences their forming ideas and opinions about many important issues. As a consequence, there is also a significant decrease in their ability to understand things with their senses. Their visual critical perception has been degraded resulting in the lack of understanding of the meaning of the image. Electronic media construct and display a world of symbols and images that exist only on the screen. They emulate simulacra (idols – simulation materials) that have nothing to do with an antecedent reality. Television reproduces and expands the semiotic logic of an advertising campaign by disconnecting the sign from what is important, opening up a new space in cultural production (Poster, 2002).

- Visual education implies perception and critical analysis of visual information.
- The imaginary level of visual intelligence is mainly characterized by the experience of the receiver of the visual message that extends beyond its perceptual ability.
- The MOOCs platforms today represent the most advanced method in distance learning.

Man loses the ability to express himself through the image and takes recourse to more intimate means, for example to reason (Arnheim, 1974). However, the combination of speech and visual perception is not competitive in a balanced person. There are experiences and phenomena that must first be coded with the aid of aesthetic perception and, then, acquire a verbal name. At the same time, art offers not only beauty and delight, but it can also offer knowledge. Knowledge of a multilevel kind goes beyond the narrow context of simple information, and illuminates the cultural level of every historical age. At the same time, art as knowledge also contributes to human cultivation by means of our observation and reflection of and communication with the artwork. By say this, one undeniably confers some special qualities upon the work of art. It is perhaps these qualities that Heidegger had in mind when he suggested in his (*Der Ursprung des Kunstwerkes*, 1950) that art is a kind of knowledge not in the sense of the observation upon previously unknown fact but in its original, authentic and, beyond any given, meaning (Heidegger, 1950). Of course, there is the opposite view represented, for example, by Picasso for whom art conveys no such original meaning (Gombrich, 1995). The painter was in fact annoyed by all those who were trying to understand his art through his paintings, saying: “*Everyone wants to understand art. Why don’t they try to understand the song of a bird?*”

In the modern school the image culture conflicts with curriculum practices, applying a postmodern model of organizing the learning process. The infinite volume of information changes the data in terms of the content of the concept of knowledge. Students possessing a huge digital library and the possibility of multiple and varied comparisons with simple images often question the concept of knowledge and the role of teachers in the classroom. At the same time, knowledge acquires the characteristics of a consumer asset, e.g. school textbooks are ever changing, adopting fashionable forms and trends and following dominant values. Changes also appear in the structure of the school with its transformation into a modern operational educational organization (Pleios, 2005).

2. Visual literacy

Visual education today is more than mere sighting. It implies perception and critical analysis of visual information. Increased visual intelligence of an electronically-educated person means easier understanding and critical understanding of the importance of the information that

is visually represented. Visual intelligence enhances the action of human intelligence, essentially by expanding the creative spirit. According to Arnheim (2004), visual perception is not a passive visual recording of the stimuli but an energetic mental process that decodes the context of the selective functions of vision. This conception is prevalent in the German philosophical tradition which understands education (*Bildung*) intends of a constant dialogical interplay between the human mind and the external (natural and social) world; in and thru this process not only the human mind acquires know ledges of the world but also it forms and transforms itself. In other words, the human mind builds and educates itself (*sich bildet*) through such acts of epistemic construction. In the case of art, it also assumes such by paideutic and self-formative role. Art, as one of the major forms of self-expression available to the human mind, takes up the mission to educate humanity and protect it from the perils of modern mass culture. In the writings of the Frankfurt School thinkers (for example, Marcuse and Adorno) one finds the highest pick of the criticism exercised against the homogeneity and instrumentalism of modern culture.

The ever-increasing dynamics of the importance of the image in modern everyday life intensifies the need for educating human beings in the way they receive and understand the visual stimuli. Visual literacy, according to Raptis and Raptis (2002), relates to educating individuals about how they critically reflect on the visual impulses of the natural and cultural environment they are members of. Visual education, according to Jeffers (2002), reinforces the crisis, resistance and global view of the projected image.

However, the combination of the word “education” with the word “optics”, with great importance, requires the study to be supported. The creation and understanding of visual messages is in part natural but their effectiveness depends, mainly, on study and practice. Visual education is characterized by visual syntax. There are elements and methods that can be used to create visual messages. Knowing these techniques can lead to better decryption of visual messages.

Visual data consists of three distinct levels:

- The introduction of visual information, consisting of infinite symbol systems;
- Visual representational material from the environment that is captured, mainly by the visual arts;
- The abstract infrastructure, which denotes the form of any physical or technical thing.

There is an extensive world of symbols, from the most abstract to the most representative, which identify organizations, actions, directions and moods, inviting man to learn them almost in the same way he learns language. Language itself is at its birth consisted of images and is then evolved through the use of symbols. Symbols are particularly important for visual education.

The imaginary level of visual intelligence is mainly characterized by the experience of the receiver of the visual message that extends beyond its perceptual ability. Understanding things, retrieving information, decoding and evaluating events or systems are highly and immediately effective through visual observation. The observation process works not only as the technical learning of a skill but is, in essence, a vital function of man’s everyday life. The abstract infrastructure, the elementary outline, is essentially the pure visual message. However, syntax, in general, in visual education simply means a methodical and detailed arrangement of the parts of a synthetic image, depending on the mechanism of perception of the human organism that defines the importance of the visual message.

Optical literacy suggests something more important than just recognizing shapes and creating visual messages creates perceptual skills. In order to practice these skills, it must go beyond the innate visual possibilities that the human body has, beyond its instinctive reactions from visual irritations, beyond its own “taste”. The development and knowledge process must

include the full range of visual elements of a representation from the most simple visual information units to the most complex ones. According to Gestalt theory, a major role for the emergence of final results in sketch, photography, or interior decoration comes from the control of elements related to the visual arts. Deep human enthusiasm and art enable someone to observe techniques and perceive the image with critical perception and reflection as opposed to the massive message that the general public perceives.

According to Arnheim (1974), man needs to cultivate virtually the virtues of his vision, contributing to his revitalization and guidance. Based on the above, visual education requires great familiarity with visual knowledge and skills such as:

- Knowledge of the visual vocabulary including elements such as balance, intensity, smoothness and sharpening, preference for the lower left, attraction and grouping, positive and negative;
- Knowledge of the basic elements of visual communication, i.e. the delineation of the point, line, shape, color, tone, texture, scale, dimensions, movement;
- Knowledge of visual conventions and the anatomy of the visual message, i.e. the visual symbols and their socially agreed meaning, the representation, the abstraction;
- Knowledge of the dynamic contrast in the image, namely contrast and harmony, the role of contrast in the visual perception, the role of contrast in composition, tone and color;
- Visual thinking, i.e. the ability to convert any type of information into an image, graph, or any visual form that encourages communication with that information;
- Mental visualization, that is, the process in which a visual mental image is formed, essentially the brain activity that takes place in a mental representation;
- Visual reasoning, which refers to the logical thinking that takes place primarily through the consistency of mental images;
- Critical view, namely the application of critical thinking skills to the visual materials;
- Visual distinction, the ability to perceive the differences between two or more visual stimuli;
- Visual reconstruction, the ability to reconstruct a partially occluded visual message in its original form;
- Visual and verbal connection, the ability to connect optical cognitive images to each other in a unified theme, as well as verbal messages with visual representations to enhance meaning;
- Reconstruction of meaning, the ability of verbal or visual reconstruction of meaning, a visual message based on incomplete information or data deficiencies through visualization;
- Construction of meaning, the ability of rendering meaning to a visual message based on any visual or verbal information. In essence, it is the “integration” of the whole process of recruitment, management and processing of the visual stimulus.

3. Reclaiming visual education

In the field of education, visual literacy essentially involves the possibility not only of using and critically evaluating visual information, but also of creating visual concepts and producing new visual messages (Kress & Van Leeuwen, 2001). So the student is called upon to play three roles through his/her training:

- The role of the viewer, i.e. the observer of the images;
- The role of the judge through which the visual messages will be reproduced;
- The role of the producer of images to others as a means of promoting his/her personal messages.

The teacher can offer his/her students many opportunities to get in touch with the image in theaters, museums, cinemas, etc. Even in his/her own classroom within the learning process, he/she uses ICT to digitally visualize the elements of his/her teaching. Students' contact with art and more generally with the structure of an image, should not be limited to acquiring knowledge of terminology or technical description skills. If the purpose of the teacher is this then he/she only succeeds in acquainting his students a product by stripping the creation from its deepest message. The child will see an object with properties such as type height and width without realizing that this may be a work of art. The relationship with the image that is of interest to him/her is of particular importance. It is a phenomenon that also requires investigation at the level of psychology, because this relationship, free from any acoustic verbal stimuli, is characterized by primary feelings (Sorlin, 1977). Throughout this process, ideas in the form of inundation must not be checked for their correctness. At this moment, students create a piece of themselves. The student's communication with the image must remain unimpeded, almost personal. Image often travels youngsters, brings them into emotional acrobatics, matching roles or distancing. Students no longer accept the passages of a picture at this point, messages that are often the result of teaching. At this point, they are the judges themselves, they are the ones who reflect and they do so through an ideal dialogue with the creators of visual information. Thus, they gradually acquire the skills of decoding the implied concepts by incorporating practices of approaching the image from many angles.

Incitement to group discussion, commentary, exchange of views and conflict of ideas are aimed at the conscious pupil, who is now able to choose and not succumb to the exaggeration that leads to mass culture. The student's critical engagement with the pictures gives him the opportunity not to drift into emotional mimetism and identities. However, once children have become familiar with the methods and techniques for image production and come into contact with distinguished authors, they must, then, also become "creators" of visual messages (Theodoridis, 2002).

The pupil's participation in the production of visual work enables him to creatively use the theoretical concepts and decode them through creative engagement. The participation, for example, in the production of a small digital film, a commercial spot or even the construction of a website will bring him, other than technical skills, experiences that will have a direct impact on his critique and perceptual ability. Through the process of creating and using collaborative learning with the project method, the student will explore, discuss and ultimately judge the aesthetic outcome based on visual education rules.

Today, the computer science courses in schools is "scrambling" with a large number of multimedia programs that cover almost all of the curriculum classes at all levels of education. However, few of them are mainly used due to lack of information, and training of teachers, as well as lack of infrastructure. The majority of programs used in the learning process are not based on issues related to the structure of visual education. Few of them use pedagogical visual information to demonstrate visual culture deficiencies on the part of their creators. In educational applications the visual representation of information must be pedagogical, serve teaching purposes according to the curriculum and, above all, be compatible with and understandable in relation to the ages of the pupils to whom it is addressed.

The image indicates visually to the student the evidence of the importance of their direct experience in relation to his/her own response to it. When a student sees, for example, visually a historical event as a static or moving image, he/she will not find the organization of the visual elements of the image sufficient. The creator of the image should try to associate this direct image with another synonym (previous) to create a comprehensive view of the historical event. In distance learning, this function is all the more important as even physical experiments come into contact with students through the sequence of images. Walker and Chaplin (1997) argue that new

technology not only offers multiple functions that produce the image culture, but also influences the ways in which culture is analyzed and studied today.

In addition, according to Friedman (2018), young children who study with digital photos improve their ability to perceive the details and broaden their linguistic parameters, including vocabulary, the use of complex sentences, ask questions and tell stories about images. Research suggests that acquiring literacy skills encourages decision-making when selecting content and designing pictures. It also encourages verbal thinking about the images that have been taken. The study demonstrates the need to implement an integrated approach to education and to make the necessary changes from early childhood.

In distance learning, multimedia applications, as well as asynchronous or modern communication platforms, are characterized by their interactive environment. According to Manovich (2001), unlike in the past, where the flow of presentation is given, the user can now interact by interfering with the flow of information. In this process of interaction, the user can choose which elements to show or which paths to follow in order to create a unique project, to feel as both the co-creator and the active shareholder of the whole process. However, in order to do so and to have a real effect, he must possess skills related to visual education.

One of the purposes of visual education is the emergence of visual thinking. Visual thinking approaches and connects complex ideas or ideas with visual elements such as images, word maps or infographics. Visual thinking can be used by e-learning professionals to create content, as well as by online learners, to visually represent their ideas and thoughts during the e-learning process. Visual thinking allows students to organize their thoughts and ideas without having to store every piece of knowledge in their minds. They can create and use a visual map of representation of the information they acquire as a reference and study and design study. When information is presented in visual form, students are more likely to absorb and link them to their real world. This is mainly due to the fact that their brains connect the new concepts with the previous knowledge. They can also better understand the relationship between relevant concepts, as well as any sub-theme related to the idea (Pappas, 2015).

According to Stewart (2013) it is required that digital media literacies enable a learner to engage, be confident and learn in a MOOC. These literacies include print and visual literacy, information literacy, critical thinking, the ability to use hypertext and mastery of complex etiquette. On the other hand, MOOCs, as one of the current e-learning and distance learning environments, have to be designed and developed according to the specifications and qualities of visual education.

4. MOOC

The use of web-video during the learning process has increased in recent years. The number of educational institutions, businesses and organizations providing their content using web-videos is increasing rapidly. Search engines and platforms are now more specialized in learning by organizing their material in distinct learning-oriented classes ([youtube.com/edu](https://www.youtube.com/edu), [mylearningtube.com](https://www.mylearningtube.com)). Most of the universities offer lectures in addition to the internet in modern forms of communication relating to mobile devices (iTunes). At the top of this industry are the Massive Open Online Courses (MOOCs), taking an increasingly important part of education (Chorianopoulos & Giannakos, 2013). The provision of a huge amount of training through MOOCs and the competition of educational institutions in relation to the thematic units, to which their services refer, shapes the need to adapt and adopt not only models or techniques of mass evaluation of learners but also the functions of the MOOCs. The functions are related to the form and appearance of the interface, the content of the training programs in relation to their quality and their interaction with the participants.

The study of platforms and research on the web for the multitude of programs provided by academic institutions and educational institutions has shown that MOOCs are currently at the cutting edge of technological developments in distance learning and the design and production of the teaching material needed to successfully such a project. The involvement of large and renowned universities and investors around the globe and the huge demand for their programs confirmed by Karsenti (2013) shows that there is “overpopulation” from across the globe that is “thirsty” for learning. Meeting the educational needs of a constantly growing population changes the data not only in distance education but also in the design of education policies at international level in terms of higher education and lifelong learning. The intercultural character of the programs and the diversity of the thematic units without any prerequisites promote equality and democratization in education, as Barber (2013) confirms, which supports the need to create barrier-free learning communities with people of different socio-cultural and economic backgrounds.

The interface that defines the user's visual approach to software has been seen to play an important role in achieving efficiency, and learner satisfaction in MOOC environments. The user's interface evaluation criteria are (edX, 2018):

- Video viewer control features where appropriate, for example, repeat, full screen, slowdown, stop and pause;
- Cognitive search engine;
- Categorization of videos and lectures for easier searching;
- Ability to download video files on the learners' personal devices;
- Help to reduce platform mistakes;
- Provision of differentiated video encoding with the direct goal of their adaptation them to the learner's connection speed;
- Set the frame so that the objects/graphics match the screen ratio;
- Provision of a standard video format as “HTML5 compatible with video”;
- Provision of videos related to the subject;
- Ability to see the trainer on a small screen frame. The student sees the training material as the trainer explains;
- Ability to switch between slides and tutors in full screen;
- Minimum video resolution (320 x 240 pixels);
- Ability to display video files with a thumbnail and (possibly truncated) title. Information about the date of view and their tracking number must be provided.

Evaluating the content of a video file is inferred from the attention the learners display while viewing it. It is important to ensure that video content is accessible, appropriate and accurate in relation to the subject of the program. Criteria include the content of the video file, good audio and video quality, and the duration set to not exceed 10 minutes. The criteria for evaluating technical specifications and video content formats are (edX, 2018):

- Clear sound (even experienced presenters are prone to logic when recorded);
- Level of detail of the information provided on the subject appropriate to the level of the audience for which the resource is designed;
- Provision of reports of the facts and information in the video;
- Provision a video of summary of lecture;
- Video length (not more than 10 minutes);
- Provision of a copy of the video lecture;
- Synchronization of video and lecture notes;
- Video size (up to 10 MB for easy transfer);
- Synchronization of video lecture and its transcription;
- Use of a color to highlight important information;
- Use of small suggestions, ease of understanding;
- Elements of surprise to attract trainees;

- Avoidance of videos with fast cuts or landscape changes;
- Text body occupying 25% to 40% of the total space of a video screen.

The form of cognitive information and the way in which distance learning is offered, the possibilities of interaction between the user and the cognitive material, the evaluation and self-assessment capabilities, the communication and recording capabilities, the environmental friendliness of the platform are the key success factors of such a platform operation.

5. Conclusions

In conclusion, education should bridge the gap between the complexity of the initial observation and the simplicity of the essential image. Education can use techniques to simplify images in order to increase the perceptual ability of students. The image approach must be abstractive so that knowledge is understandable and easily accessible. However, abstraction takes place in logical contexts and is always maintained in correlation with empirical reality. Visual thinking requires that one has the ability to promote visual patterns as images of the forces (mind, body, machine, idea, society, etc.) in which they are directly related to our existence or life itself. In this spirit, MacLuhan (1964) has claimed “*the media is nothing more than an extension of ourselves*”.

According to the above, the MOOCs platforms represent the most advanced method in distance learning. They host and offer educational programs that have been enriched with all the capabilities and tools ensuring, as much as possible, the successful design of highly specialized programs. Designers and managers of academic and educational institutions are invited to exploit this wealth of tools and design and implement programs that are both pedagogically and technologically oriented and friendly, focusing on the uninterrupted and successful flow of educational materials. They should also be distinguished for embracing, freedom consistency, versatility, efficiency and aesthetic and minimalist design. Last but not least, our analysis has also shown that MOOCs platforms should abide by the rules of Nielsen (1995) regarding their usability.

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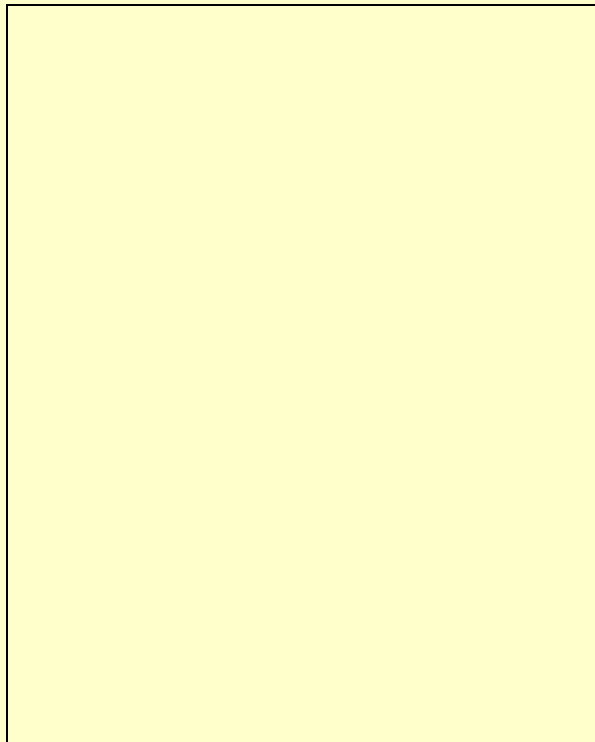
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Upcoming Event

We are looking forward to the **3rd International e-Conference on Studies in Humanities and Social Sciences (3IeCSHSS)** that will be held on 28 June 2019, using the same online model. We hope that it will be an interesting and enjoying at least as the previous e-Conference.

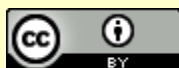
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